

# Roman Catholic Diocese of Raleigh

## Account Request Form

Name of Parish \_\_\_\_\_ City \_\_\_\_\_

Name of person requesting account \_\_\_\_\_

Date \_\_\_\_\_

Type of account: **Investment funds with Wachovia**

Permanent Endowment (legal agreement required)

Custodial (long term savings)

*These funds are held in Diocesan investment accounts with Wachovia Bank. The accounts are merged with the general investment assets of the Diocese and invested by fund managers under the terms of the Diocesan Investment Policy and monitored by the Diocese's management, Investment Committee and investment advisor. These funds are at risk for market value fluctuations. Funds in these accounts should be viewed as long term in nature (three or more years). These accounts should not be used for short term needs. A minimum deposit of \$5,000 is required to open a new account.*

**Diocesan Savings and Loan Program**

(No minimum required)

Savings (specific rate of return)

Account Name \_\_\_\_\_

Purpose of account \_\_\_\_\_

Signature \_\_\_\_\_

Send to:

Diocese of Raleigh  
715 Nazareth St.  
Raleigh, NC 27606

Debbie Rossi for Wachovia Account

Patsy Haisman for Diocesan Savings Account

Date Received by Catholic Center \_\_\_\_\_

Approved by \_\_\_\_\_

Date account opened \_\_\_\_\_

Comments \_\_\_\_\_