



COUNCIL ACCOUNT UPDATE FORM

Complete this form to update your Council Account information. You can change the contact information, officers or trustees for an existing fund. It is not necessary to enter information that has not changed. If you need assistance, call toll-free at (833) 877-0728 or email to charitablefund@kofc.org.

1. Current Council Account Fund Information

Council Account Fund Name

Account ID

2. Grand Knight Update

The Council Account must have the grand knight and treasurer as primary advisors. Analogous roles will be used for other K of C structures; i.e., state deputy and state treasurer for state councils or faithful navigator and purser for assemblies. Any changes to the Primary Advisor's address will become your account's primary address for all correspondence unless otherwise noted.

We have elected a new Grand Knight/Faithful Navigator/State Deputy

Contact information for this officer will be pulled from Knights of Columbus membership records. The new officer will be contacted by KCCF to provide log-in credentials.

3. Treasurer Update

The Council Account must have the grand knight and treasurer as primary advisors. Analogous roles will be used for other K of C structures; i.e., state deputy and state treasurer for state councils or faithful navigator and purser for assemblies.

We have elected a new Treasurer/Purser/State Treasurer

Contact information for this officer will be pulled from Knights of Columbus membership records. The new officer will be contacted by KCCF to provide log-in credentials.

4. Trustee 1 Update

Each Council Account must add two trustees, who will have read-only access to the Council Account. The trustees can be any other council officer and do not have to be a council trustee.

Mr. Dr.

First Name, MI, Last Name

Year of Birth

Street Address

City

State

Zip

Email

Primary Telephone #

5. Trustee 2 Update

Each Council Account must add two trustees, who will have read-only access to the Council Account. The trustees can be any other council officer and do not have to be a council trustee.

Mr. Dr.

First Name, MI, Last Name

Year of Birth

Street Address

City

State

Zip

Email

Primary Telephone #

6. Acknowledgment of Terms

I certify that, to the best of my knowledge, all information in connection with this form is accurate, and I will notify KCCF in writing of any changes.

Primary Advisor Signature

Date

Primary Advisor 2 Signature

Date

7. Return this completed form by mail or scan and email to:

Knights of Columbus Charitable Fund | 1 Columbus Plaza | New Haven, CT 06510 | charitablefund@kofc.org

Knights of Columbus Charitable Fund is an independent, nonprofit, public charity with a donor-advised fund program. Various entities affiliated with Knights of Columbus provide certain investment management and administrative services to Knights of Columbus Charitable Fund. Knights of Columbus Asset Advisors, an SEC registered investment advisor, serves as the investment manager of Knights of Columbus Charitable Fund, and the assets are invested in investment funds managed by Knights of Columbus Asset Advisors. Investing involves risk. The value of an invested donation will fluctuate over time and may gain or lose money.

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