

Catholic United Investment Trust (CUIT)

Account Opening

All of the participants in the CUIT Funds must be listed or be eligible to be listed in the Kenedy Official Catholic Directory, widely regarded as the authoritative listing of all Catholic institutions in the United States. For more information about the Kenedy Official Catholic Directory, please visit their website at www.catholicdir.com.

Allow 5 days to open a new Organization or Account once the proper forms are received in good order.

Forms are available at www.cbisonline.com

All forms may be faxed to CBIS: U.S. 1-844-261-6489; International 508-599-4183;
or via mail:

Regular Mail Address

Catholic United Investment Trust
P.O. Box 9683
Providence, RI 02940-9683

Overnight Express Delivery Address

Catholic United Investment Trust
4400 Computer Drive
Westborough, MA 01581-1722

New Organizations

The following forms are required to open a new Organization:

- Investment Account Application
- Certificate of Resolution
- IRS W-9 Request for Taxpayer Identification Number

Additionally, if applicable, please complete:

- Target Allocation Form
 - Online Access Form
 - Purchase Form
- **Investment Account Application**
Complete with information about your Organization, account and statement holders.
 - **Certificate of Resolution**
The Certificate of Resolution sets forth the names and signatures of persons authorized to act for the Participant Organization.

If your Organization has a requirement for two authorized signers, please contact your CBIS Portfolio Specialist for a Dual Signature Certificate of Resolution

- **IRS W-9 Request for Taxpayer Identification Number**
Complete with the Taxpayer Identification Number of the Organization.
- **Target Allocation Form**
Use this form to set up Target Allocations on your account.

New Organizations (continued)

- **Online Access Form**

Use this form to create an online user ID, and set up access to your accounts online. View only online access will enable you to view your accounts online and print statements. Transactional access allows you to view your accounts online, print statements and initiate certain transactions.

- **Purchase Form**

Once your account is established, use this form to:

- Send in a check deposit
- Advise of an incoming Wire to multiple CUIT Funds, not per target allocation
- Request a purchase of Fund shares via Automated Clearing House ("ACH")
- Set up Automatic Investment Plan (AIP) via ACH

New Accounts Under Existing Organizations

For established Participant Organizations, the following form is required to open a new account:

- New Account Application (Current CBIS Participants)

Additionally, if applicable, please complete:

- Target Allocation Form
- Online Access Form
- Purchase Form

- **New Account Application (Current CBIS Participants)**

Use this form to open an additional account under your existing Organization.

- **Target Allocation Form**

Use this form to set up Target Allocations on your account.

- **Online Access Form**

Use this form to create an online user ID, and set up access to your accounts online; or to add new account to existing user ID. View only online access will enable you to view your accounts online and print statements. Transactional access allows you to view your accounts online, print statements and initiate certain transactions.

- **Purchase Form**

Once your account is established, use this form to:

- Send in a check deposit
- Advise of an incoming Wire to multiple CUIT Funds, not per target allocation
- Request a purchase of Fund shares via Automated Clearing House ("ACH")
- Set up Automatic Investment Plan (AIP) via ACH