

Catholic United Investment Trust (CUIT)

Account Updates

Please allow 5 days for account updates to be processed.

Forms are available at www.cbisonline.com to facilitate updates to your account.

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

Statement Holder Change Form

To add or delete a statement holder, complete the **Statement Holder Change** form. If you are updating the address of an existing statement holder, complete the **Address Change** form.

Address Change Form

To update the organization or existing statement holder address, phone number or email address complete the **Address Change** form.

Online Access Form

Use this form to add, update or delete online access. 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.

Target Allocation Form

The **Target Allocation** form is to be used to set up or change Target Allocations without a rebalancing. Target Allocation changes can take up to 5 days to complete. If you have transactions to process per target allocations within the 5 days, notify BNYM Account Services at U.S. 1-800-321-7194 or International 508-871-9942 to advise that new targets have been sent in, in order to assure transactions are completed with the correct allocation.

Certificate of Resolution

The Certificate of Resolution sets forth the names and signatures of persons authorized to act for the Participant Organization. An updated Certificate of Resolution will replace and supersede all prior Certificate of Resolutions.

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