

TRUSTEES OF DONATIONS



DIOCESAN INVESTMENT TRUST

Account Rebalancing Form

Church or Organization Name: _____

Available Rebalancing Options

Option 1: Choosing this option will result in the automatic restoration of the designated account's Stock Fund / Income Fund / Fossil Fuel Free Fund balance on the last business day of the month following the end of each quarter (April 30, July 31, October 31, January 31).

Option 2: Choosing this option will result in the restoration of the designated account's balance to the Trustees' recommended allocation (currently 65% Stock Fund / 35% Income Fund) each time the Trustees rebalance the DIT's trust funds.

Example		Acct. #	Acct. Name	Stock Fund	Target Balance		FF Free Fund
Option 1	Option 2				Income Fund		
	X	D6150A	Church Endowment Fund		As Currently Recommended		
X		D6150B	Church Renovation Fund	e.g., 35%	30%		35%

Option 1	Option 2	Acct. #	Acct. Name	Stock Fund	Target Balance		FF Free Fund
					Income Fund		
_____	_____	_____	_____	_____	_____		_____
_____	_____	_____	_____	_____	_____		_____
_____	_____	_____	_____	_____	_____		_____
_____	_____	_____	_____	_____	_____		_____
_____	_____	_____	_____	_____	_____		_____

For additional accounts please photocopy this form.

Treasurer or DIT Contact: _____
 Telephone Number: _____
 Authorized Signature: _____
 Please return by mail to:

Attention: Bill Boyce
 138 Tremont Street
 Boston, MA 02111

Or by Facsimile to: Attention: Bill Boyce – 617-338-5579