

Funds Management FAQs

> Do we need a separate form to update multiple funds?

No. As long as the changes to be made will be the same on each fund, a list can be attached to the form providing the fund names and numbers of those to be changed.

◆ What form will I need to use to change the department of a fund?

Complete the fund change form and list the new department in Section II.

◆ Is a Responsible Party Designee allowed to sign the form?

The Responsible Party designee is only allowed to sign for the Responsible Party on forms that list both Responsible Party or designee in the approval portion of the form.