

Change of Ownership

INVESTMENT INFORMATION

Note Number

☐ Add New Owner ☐ Replace a Current Owner

PLEASE ADD THE FOLLOWING OWNER

Prefix	Name of New Owner	Social Security Number	Date of Birth
Gender	Daytime Phone	Email	
Mailing Address	City	State	ZIP
Physical Address <i>(If different than above)</i>	City	State	ZIP

☐ I understand there may be tax consequences for this change.

New Owner Signature

Date

PLEASE REMOVE THE FOLLOWING OWNER

Printed Relinquishing Owner Name

Relinquishing Owner Signature

Date

☐ Check if relinquishing Owner is deceased. Include certified copy of death certificate.

PRIMARY OWNER

☐ I/we hereby authorize Church Extension Plan to change the ownership of the Promissory Note(s) listed above.

Please report interest earned under the name and Social Security Number of the following Primary Owner:

Primary Owner Name

Social Security Number

Primary Owner Signature

Date

SUBMITTING YOUR FORM

To submit your completed form with all required attachments, send a scanned PDF (or similar format) to investment@cepnet.com or mail/fax the document(s) to the address/fax number below.



Church Extension Plan

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