



Purchase a New Investment



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Summary of Procedure

This document describes the process for how to open a new investment in Online Access. Investments can only be opened online by current investors with an Online Access login. The option to open investments online is only available to individual investors. Authorized Signers do not have the option to open an investment online on behalf of a church.

New Investment

In your Online Access account, select the **Purchase New Investment** option from the menu to begin the process of opening a new investment.

Step 1: Your state of residence will autofill. Click **Begin**.

Step 2: Open and review each document on the next page. Select each checkbox to confirm you have read and understand the documents, then click **Next**. You will be unable to select the checkboxes until the documents have been opened.

Step 3: Open the **Rate Sheet** to review the interest rates for each investment option. Select the checkbox acknowledging you have read and understand the document. You will be unable to select the checkbox until the document has been opened.

Next, click **Select** on the investment type you would like to open. You have the option to choose an Investment Certificate or an Individual Agreement.

Click the checkbox on the pop up to acknowledge receipt of the Offering Circular. Then click **Submit & Continue**.

Step 4: Select your Interest Payment option. You may choose to compound the interest back into the principal, or you may choose to distribute the interest to an external bank account. If you choose to distribute interest, you will be prompted to choose the frequency of the distributions and the bank account to receive the interest. Click **Continue to Funding**.

NOTE: External bank accounts must be added to your Online Access account prior to this process.

Step 5: Enter the amount to deposit into the new investment and select the bank account to fund the new investment with. Select the checkbox to acknowledge you have reviewed all the information on this page and approve the transaction, then click **Submit Application**.