

SimpliCD Sign Up Procedures

For assistance, please contact a SimpliCD Specialist at 214.703.7854 or email simpliCD@catalystcorp.org



Checklist

All forms are available on the corporate website at www.catalystcorp.org/investments/resource-pages/simpliCD-forms

Action	Complete	Date
<u>Custodial Agreement</u>		
Printed		
Completed		
Faxed to 214.703.7918		
Mailed Original to Catalyst Corporate FCU		
<u>Credit Union Contact Information</u>		
Printed		
Completed		
Faxed to 214.703.7918		
<u>National Automated Settlement Agreement Form</u>		
Printed		
Completed		
Faxed to 214.703.7918		
Mailed Originals to Catalyst Corporate FCU		
<u>Corporate Resolution</u>		
Printed		
Completed		
Faxed to 214.703.7918		
Mailed Originals to Catalyst Corporate FCU		
<u>On Own List</u>		
Printed		
Completed*		
Faxed to 214.703.7918		
Mailed Originals to Catalyst Corporate FCU		
* The on own list shows your portfolio of current holdings. This form should include the following for each of your current investments:		
Insurance Number		
Company name, issuing institution		
State		
City		
Maturity date		
Investment Amount		
<i>Providing Catalyst with the above information outlined above is important to assist our SimpliCD experts in tracking your future investments. It will assist us in preventing placement of funds in the same institution you may have already invested with.</i>		