

Instructions for Completing the BYU Investment Pool Capital Addition or Withdrawal On-line Form

This form can be used for making investments to, or withdrawals from, the Investment Pool. Use a separate form for each trade. You may complete this form by filling it out online and then printing and/or saving a copy. Instructions for completing the form are shown below.

1. Begin by clicking in the space above the effective date line. ***The effective date must be the first day of the month.*** This field is date formatted. Type in the date in numerical format (mm/dd/yyyy).
2. Move to the next field by pressing the "Tab" key or clicking in the space above the line for any other field.
3. When the form is completed, print the form, obtain the appropriate signatures, and send the form to the University Treasurer at A-153 ASB.

In order to be processed on the effective date, Treasury Services must receive this form by the 28th of the month preceding the effective date.