



Security for People with Special Needs since 1990

office | 804.740.6930 toll free | 888.241.6039 fax | 804.740.6065

address | PO Box 29408, Richmond, VA 23242-0408

Statement Options Form

Commonwealth Community Trust (CCT) works closely with the Trust Company of Virginia (TCVA) to provide the Primary Advocate with financial information about the Beneficiary's sub account. By default, quarterly financial statements are sent in the mail to the Primary Advocate unless an alternate option was selected either using this form or on the original Joinder Agreement when the Beneficiary's trust was established.

If you would like to change the way you are receiving account information, please carefully review the following options and select the option that best suits your preferences:



I would like to access information about my account online, including electronic financial statements available quarterly. Please send me an ID number and instructions to access financial information for the trust online. I understand that I will no longer be receiving statements in the mail from CCT.

OR



I would like to receive financial statements mailed quarterly.

OR



I would like to receive only an annual financial statement mailed each January. I understand that I will no longer receive quarterly statements in the mail from CCT.

Account Number:

Beneficiary name:

Advocate names:

Advocates Address:

Email Address:

**Advocate/Authorized
Signature:**

Date Submitted:
