

Equity Management Fund Deposit Form

Sig Ep National Housing created the Equity Management Fund (EMF) as a savings vehicle for AVCs to earn favorable rates of return on surplus funds. In turn, these funds are used to advance SigEp housing initiatives across the country.

Quick Facts

- A minimum deposit of \$1,000 is required to open an account. Deposits may be made by an AVC or a chapter.
- As of 2016, there are 49 active EMF accounts established for chapters across the country.
- Total Balance of the EMF (as of 2016): \$3.2 million
- The rate of return is equal to the 10 year treasury rate minus 50 basis points (0.5%).
- Average Interest Rate (for 2015-2016): 1.63%

Withdrawals are limited to no more than one per quarter. SigEp National Housing requests advanced notice of at least 90 days for withdrawals over \$100,000. Reasonable advance notice is requested for all other withdrawals. Funds will be disbursed no later than 30 days after receipt of the completed withdrawal request and all requested supplemental documentation.

For questions, please contact:

Cassandra Ratti
Executive Assistant
SigEp National Housing
(804) 823-9348
cassandra.ratti@sigep.net



Sig Ep National Housing, LLC
310 South Boulevard
Richmond, Virginia 23220
804 353-1901 • www.SigEp.org

Equity Management Fund Deposit Form

Deposit Summary

Chapter: _____ Date: _____

Deposit Amount: \$_____ (*\$1,000 minimum for initial deposits*)

Alumni & Volunteer Corporation

Legal Name: _____

Current Officers

President: _____

Email: _____ Phone: _____

Vice President: _____

Email: _____ Phone: _____

Treasurer: _____

Email: _____ Phone: _____

Secretary: _____

Email: _____ Phone: _____

Deposit Information

Make checks payable to:

SigEp National Housing, LLC
Memo Line: EMF Deposit - Chapter Name

Mail the deposit and this form to:

SigEp National Housing
310 South Boulevard
Richmond, VA 23220