

Participant Name: \_\_\_\_\_

Select one of the following:

- I am an existing ISJIT Participant. I need to deactivate an existing Primary Contact and activate a new Primary Contact. (Complete Sections A, B, C and D below.)
- I am a new ISJIT Participant. I need to designate a Primary Contact for the first time. (Complete Sections B, C, and D below.)

**SECTION A: EXISTING ISJIT PARTICIPANT**

1. I am an existing ISJIT Participant. Please De-Activate \_\_\_\_\_ (name of person) as our ISJIT Primary Contact, and Activate \_\_\_\_\_ (name of person) as our new ISJIT Primary Contact.
2. To verify account ownership, one of my existing ISJIT account numbers is: \_\_\_\_\_  
*(I have attached Supporting Documentation, such as Board Resolution Appointing New Contact)*

**SECTION B: PRIMARY CONTACT DESIGNATION**

3. Please designate the ISJIT Primary Contact person for your Entity:  
Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_ Email: \_\_\_\_\_  
Position: \_\_\_\_\_ Address: \_\_\_\_\_

**SECTION C: ACCOUNT SECURITY / AUTHORITY**

4. The above-named primary contact will have the authority to:
  - Certify the Authorized Personnel at the Entity, and Specify the PMA GPS™ Access Capabilities;
  - Transfer Funds to/from ISJIT, and to/from Approved Depository;
  - Add or Delete the Bank Information (ACH/Wire/E-Pay) ISJIT has on File for the Entity;
  - Initiate/Approve E-Pay Transactions;
  - Place Orders for Checks and Deposit Tickets;
  - Certify Master Signature Cards;
  - Sign Up for State Aid Deposits, ISJIT Sweep Services, Easy Procure, PaySchools; and
  - Open, Close, Change and Reactivate ISJIT Account Information.
5. Security:
  - Yes, the primary contact is authorized to move money (make purchases, redemptions, transfers and fixed rate investments).
6. Account Authority:
  - Yes, the primary contact is authorized to all ISJIT sub-accounts for my entity.
7. ISJIT Statements and Confirmations:
  - The primary contact elects to retrieve electronic statements, confirmations and other communications via PMA GPS™\*,
  - or ISJIT will mail monthly statements and confirmations to the primary contact at the above address.
8. System Access: Access to PMA GPS™ will automatically be granted if the primary contact elects to receive electronic statements. A username and password will be sent via email and U.S. mail, respectively.
  - Request access to PMA GPS™\* if electronic statements are not elected.

\*The PMA Governmental Portfolio System ("PMA GPS™") is an online system that provides 24 hour access to your ISJIT account(s).

9. Email Notification:

- Yes, send an email when online statements and confirmations are available.
- No, do not send an email when online statements and confirmations are available.

10. Daily Activity:

- Yes, the above-named person will be the primary contact person for all ISJIT daily activity.

NOTE: To designate additional authorized personnel, please complete the *Authorized Personnel Information* form for each such authorized person.

**SECTION D: AUTHORIZATION**

This section must be completed by the Board Secretary, Treasurer or School Business Official. The authorizations set forth on this form shall remain in full force and effect until the Fund receives written notification of a change.

I hereby certify that I am authorized by the School Corporation to execute this Authorized Personnel Information Form for ISJIT in accordance with the Joint Powers Act and the Declaration of Trust:

Authorized Signer: \_\_\_\_\_ Phone: \_\_\_\_\_  
Printed Name: Title: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_ Effective Date of Request: \_\_\_\_\_

NOTARY:

Witness my hand hereto affixed this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

Subscribed and sworn before me this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

Sigtanure of Notary Public: \_\_\_\_\_

Completed forms may be submitted to ISJIT via fax, email or regular U.S. mail.  
Fax to 866-548-8633, Attn: ISJIT | Scan and Email to: [isjit@pmanetwork.com](mailto:isjit@pmanetwork.com)  
Mail to: ISJIT Administration, PMA Financial Network, Inc., 2135 CityGate Lane 7th FL, Naperville IL 60563