



Empowering your Constituents with Online Access

2014 DDI User Group Meeting
April 22-23, 2014



Serving those who serve others



Show of Hands:

Who can access their personal investments, loans, or donations online?



Show of Hands:

Who currently has implemented an online solution for their constituents?



Statistics

Online / Mobile Banking Statistics

   Share This



Statistic Verification

Source: Pew Research Center, Federal Reserve

Research Date: 1.1.2014

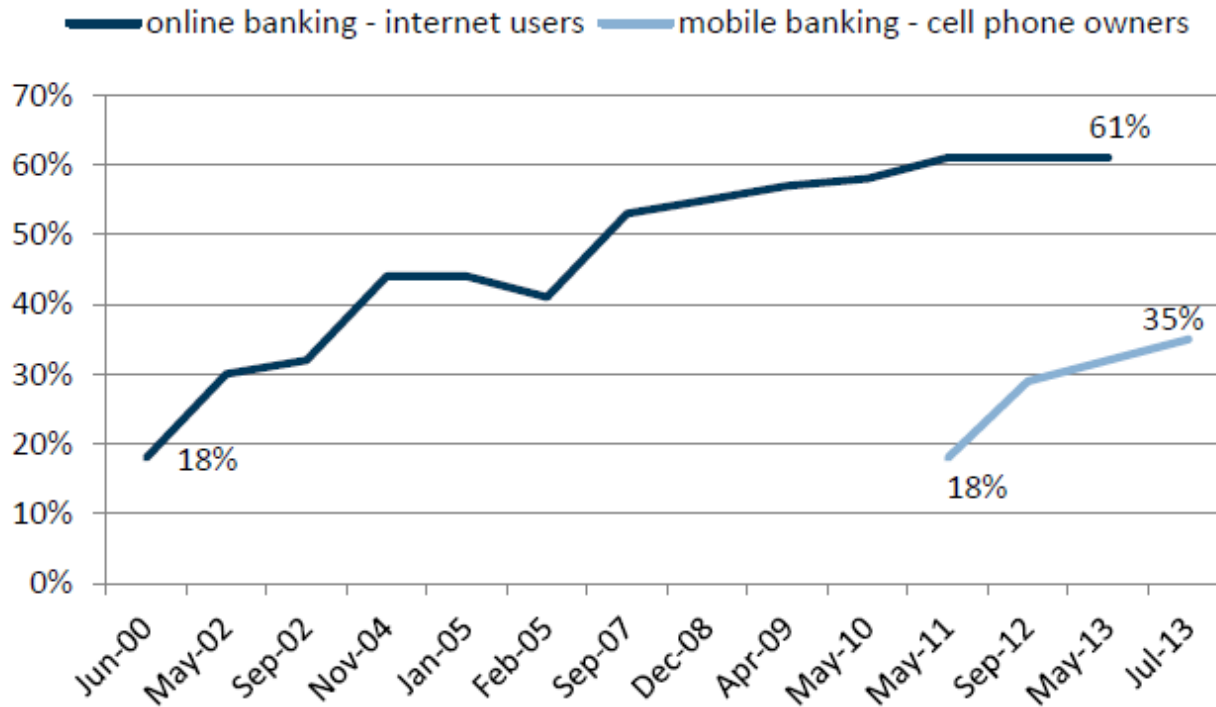
Online banking or Internet banking or E-banking allows customers of a financial institution to conduct financial transactions on a secured website operated by the institution, which can be a retail bank, virtual bank, credit union or building society.

Online / Mobile Banking Statistics	Data
Percent of those who managed household finances who banked online at least once in the past 12 months	81 %
Percent of people who used mobile phone banking within the past 12 months	19 %
Number of Americans who bank online	69 Million
Online banking customer satisfaction	78 %
Percent of consumers who receive electronic checking account statements	42 %
Percent of consumers who paid a bill online through their bank in the past month	56 %

Statistics

Online and mobile banking

% of internet users who do online banking vs. the % of cell phone owners who use mobile banking



Source: Pew Research Center's Internet & American Life Tracking and Omnibus Surveys, 2000-2013. Margin of error for results based on internet users is +/- 2.5 percentage points and +/- 3.8 percentage points for results based on cell phone owners.

Statistics

	% Who Use Desktop-Based Online Banking
All internet users	61%
Men	63%
Women	58%
Race/Ethnicity	
White	63%
Black	48%
Hispanic	62%
Age	
18-29	67%
30-49	65%
50-64	55%
65+	47%
Education	
No high school diploma	30%
High school grad	47%
Some college	66%
College+	75%
Household Income	
Less than \$30,000 per year	48%
\$30,000 to \$49,999	57%
\$50,000 to \$74,999	71%
\$75,000+	75%
Urbanity	
Urban	62%
Suburban	66%
Rural	42%

The Financial Brand, <https://thefinancialbrand.com>



Benefits of Online Access for your Constituents?

- ❑ Convenience
- ❑ Availability
- ❑ Real-Time Access
 - Transaction History
 - Statements
 - And More...
- ❑ Complete Transactions Online
 - New Investments
 - Recurring/One-time Investment Deposits
 - Loan Payments





Benefits of Online Access for your Organization?

- ❑ Less Inquiry Email & Calls to Support
- ❑ Cost Savings with Electronic Statements
- ❑ Increase in New Investment Deposits
- ❑ Better Loan Payment Processing
- ❑ Higher Level of Trust
- ❑ Better Appeal to the 40's and under Age Bracket
- ❑ Better Donor Connection
- ❑ Low Cost





Electronic Statement Savings

The cost to mail a statement is between .60 - \$1.00+ per statement when you figure in postage, paper, envelope, ink, and labor cost.

Quick Example:

500 Monthly Electronic Statements =

\$3600-\$6000 Savings Per Year!



DDI Online Web Access

2 Versions of Online Access:

- Inquiry Only Version
- Transactional Version

Enrollment

The screenshot displays a software application window with the following components:

- Menu:** File, Dashboard, Window
- Toolbar:** New, Edit, Delete, Save, Undo, Processes, Accounts, View, Actions, Options, Exit
- Navigation Tabs:** Name/Address, Status, Relationships, Memo
- Search/Filter:** PIN: 990057058, Peyton Manning
- Form Fields:** Name (Personal, Professional, Clergy, Education, Alt ID, DBA), Prefix, First name, Middle name, Last name, Suffix, Sex, AI codes: IN, Name 2, Tax ID: 123-45-6789, Source, Created 04/21/2014, Salutation: Dear Peyton Manning:

Enrollment

Web Access for PIN 990057058 - Peyton Manning

Web user ID	Access type	PIN	Name
	P	990057058	Manning Peyton

Web user ID:

PIN: 990057058 Manning Peyton

Organization PIN: 

Web access type:

Activation code:

Enrollment



HOME

LOGIN

REGISTER

CONTACT US

Registration

Activation Code:

SSN/Tax ID:

Activating your account is easy!

- To start this process you will need two pieces of information:
 1. Activation Code - This unique code was provided to you by your church/organization administrator.
 2. ID - Social Security Number or Tax Id
- Enter your Activation Code and SSN/Tax Id and select the "Register" button.
- If we are able to validate your information, you will be taken to the Account Registration page so that you may complete your account setup.
- Once the activation process has started, you will need to complete all steps within 24 hours.

Enrollment



HOME LOGIN REGISTER CONTACT US

Account Profile for

Display Name:

User ID: 

Password: 

Confirm Password:

Email: 

Confirm Email:

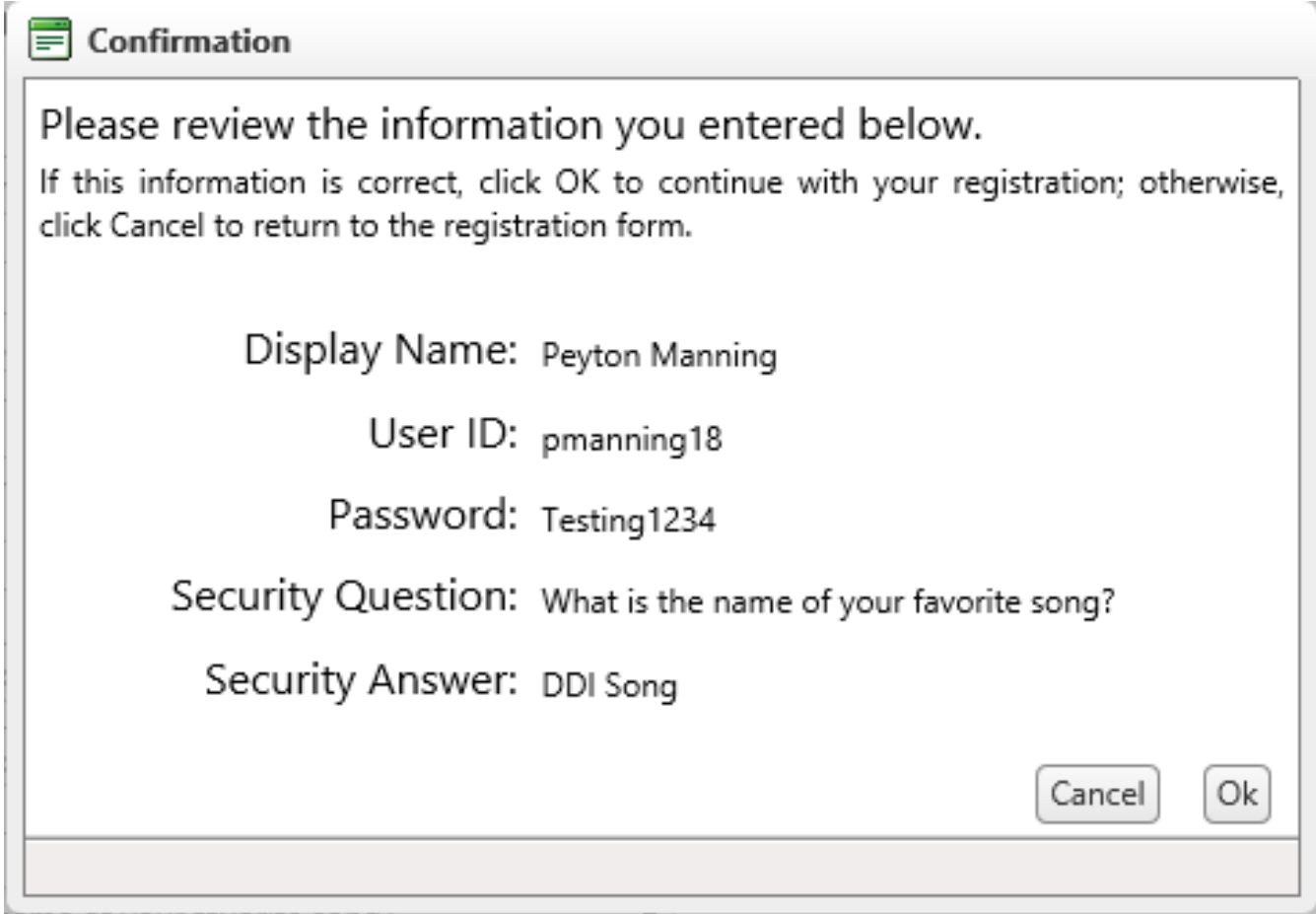
Security Question:

Security Answer:

Cancel

Submit

Enrollment

A confirmation dialog box with a title bar containing a green icon and the text "Confirmation". The main content area contains a message asking the user to review their registration information. The information displayed is: Display Name: Peyton Manning, User ID: pmanning18, Password: Testing1234, Security Question: What is the name of your favorite song?, and Security Answer: DDI Song. At the bottom right, there are two buttons: "Cancel" and "Ok".

Confirmation

Please review the information you entered below.
If this information is correct, click OK to continue with your registration; otherwise, click Cancel to return to the registration form.

Display Name: Peyton Manning
User ID: pmanning18
Password: Testing1234
Security Question: What is the name of your favorite song?
Security Answer: DDI Song

Cancel Ok

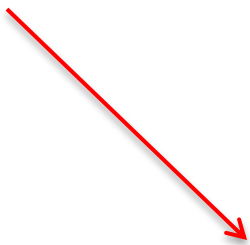
Enrollment



HOME LOGIN REGISTER CONTACT US

Your Online-CEF account has been created.

An email has been sent to the address you provided when creating your account. This email contains a link that will complete the registration process and activate your account. You cannot login to Online-CEF until your account has been activated.



Verify Your Email Address

tambler@ddi.org

Sent: Mon 4/21/2014 8:50 AM


To: Patrick McHugh

Welcome to Online-DDI Demo!

Please click on the following link to verify your email address and activate your account:


<https://www.ddi-online.org/EmailVerify.aspx?org=ddi&code=QdiGVgO8b3eJEcr77I9MTwn834TWCD>

Enrollment



HOME LOGIN REGISTER CONTACT US

✓ Email address verified. Please login below.

 **Secure Login**

User ID:

Password:

[Forgot your User ID?](#)

[Forgot your Password?](#)


Enrollment

DDITM
Serving those who serve others

HOME LOGIN REGISTER CONTACT US

✓ Email address verified. Please login below.

By checking this box, I agree that I have read and understand the Electronic Signature Agreement.

 Agree Cancel

Enrollment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME

ACCOUNTS

STATEMENTS

CONTACT US

Welcome to Online Access.

[Purchase
Investment](#)

Disciple Data Inc. wants to provide you with the most up-to-date tools to manage your financial resources. To set up your **Online Access**, follow these easy steps:

- ✓ Begin by starting an investment via phone, mail, or fax.
- ✓ Call the DDI office at 317-713-2480 to receive your activation code for **Online Access**.
- ✓ Complete your online registration and login to your **Online Access** account.
- ✓ Keep track of your investments through **Online Access** updates.
- ✓ Open new investments right online when you login to your account.
- ✓ Enjoy the freedom of your secure **Online Access** account.

Online Access - Easy, flexible and secure!

Account Access



Welcome . . . Peyton Manning

[MY PROFILE](#) [LOGOUT](#)

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Investments

Account Number	Investor	Balance
000002460	New Covenant United Methodist Church	\$106,492.16
272694103	Bethel Greek Orthodox Church	\$0.00
Total:		\$106,492.16

Loans

Account Number	Borrower	Balance
000002460	New Covenant United Methodist Church	\$0.00
272694103	Bethel Greek Orthodox Church	\$124,406.62
Total:		\$124,406.62

Donations for 2014

Date	Description	Amount
No records to display.		
Total:		\$0.00

Investment Summary



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Account #: 000002460

New Covenant United Methodist Church
7191 Village Rd
Helena, AL 35080

For Account 000002460:

I'd like to...

► [Purchase a New Investment](#)

Investment Summary

Investment Number	Investment Type	Interest Rate	Maturity Date	Interest Paid YTD	Interest Payment Method	Available Balance	Investment Balance
133662	Three Year Flex Plus Variable	2.2097 %	2/14/2017	\$0.00	Compound, Semi-Annually	\$106,492.16	\$106,884.63

Page size: 10 | 11 items in 2 pages

Investment Inquiry



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MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 00002460

New Covenant United Methodist Church
7191 Village Rd
Helena, AL 35080

Investment 133662 Details

Investment Type	Three Year Flex Plus Variable
Interest Rate	2.2097 %
Purchase Date	Monday, February 14, 2011
Maturity Date	02/14/2017
Available Balance	\$106,492.16
Accrued Interest	\$392.47
Account Value	\$106,884.63
Taxable Interest Reported YTD	\$0.00
Interest Withheld YTD	\$0.00

Investment Transactions

Transaction Number	Date	Description	Amount	Balance
2289927	02/28/2014	Interest rate change to 2.21%	\$0.00	\$106,492.16
2284091	02/14/2014	Extend investment New rate: 2.21%	\$0.00	\$106,492.16
2282995	01/31/2014	Interest rate change to 2.21%	\$0.00	\$106,492.16
2262349	12/31/2013	Pay investment interest by compounding	\$1,207.16	\$106,492.16
2267439	12/31/2013	Interest rate change to 2.21%	\$0.00	\$106,492.16
2259228	11/30/2013	Interest rate change to 2.26%	\$0.00	\$105,285.00
2251784	10/31/2013	Interest rate change to 2.27%	\$0.00	\$105,285.00
2244138	09/30/2013	Interest rate change to 2.28%	\$0.00	\$105,285.00
2236196	09/03/2013	Interest rate change to 2.31%	\$0.00	\$105,285.00
2228610	08/01/2013	Interest rate change to 2.32%	\$0.00	\$105,285.00

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Loan Summary



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Account #: 272694103

Bethel Greek Orthodox Church
5321 Valleydale Rd
Sioux City, IA 51104

Loan Summary

Loan Number	Loan Type	Loan Balance	Interest Rate	Payment Amount	Amount Due	Due Date
12311	Church	\$124,406.62	4.4317 %	\$1,773.00	\$1,403.00	05/01/2014
12947	Church	\$0.00	6.2500 %	\$189.00	\$0.00	
Totals:		\$124,406.62		\$1,962.00	\$1,403.00	

Loan Details



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Account #: 272694103
 Bethel Greek Orthodox Church
 5321 Valleydale Rd
 Sioux City, IA 51104

For Loan 12311:

- I'd like to see...**
- ▶ [Loan Details](#)
 - ▶ [Automatic Payment Settings](#)
 - ▶ [Payment History](#)
 - ▶ [Transaction History](#)
- Online Loan Payments...**
- ▶ [Make a Payment](#)

Loan 12311 Details


Payment Information

Payments	Regular	Special	Escrow
Amount	\$1,773.00	\$0.00	\$0.00
Frequency	Monthly	None	
Due Date	Thursday, 05/01/2014		

Detailed Information

Loan Status	Loan fully advanced, making regular pmt
Interest Rate	4.4317 %
Maturity Date	Thursday, 10/01/2015
Rate Adjust Date	Thursday, 10/01/2015
Amortization Date	Thursday, 04/01/2021
Next Review Date	Tuesday, 04/01/2014
Interest Paid YTD	\$1,238.05
Principal Paid YTD	\$4,080.95
Loan Balance	\$124,406.62
Accrued Interest	\$317.21
Amount Due	\$1,403.00
Commitment Amount	\$250,000.00
Amount Available	\$0.00
Advanced Amount	\$250,000.00

Loan Automatic Payment Settings



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Account #: 272694103

Bethel Greek Orthodox Church
5321 Valleydale Rd
Sioux City, IA 51104

Automatic Loan Payments

There are no automatic loan payments setup for this loan.

For Loan 12311:

I'd like to see...

- ▶ Loan Details
- ▶ **Automatic Payment Settings**
- ▶ Payment History
- ▶ Transaction History

Online Loan Payments...

- ▶ Make a Payment

Loan Payment History



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WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 272694103

Bethel Greek Orthodox Church
5321 Valleydale Rd
Sioux City, IA 51104

For Loan 12311:

I'd like to see...

- ▶ Loan Details
- ▶ Automatic Payment Settings
- ▶ **Payment History**
- ▶ Transaction History

Online Loan Payments...

- ▶ Make a Payment

Loan Payment History for Loan 12311

Payments for Loan 12311

Due Date	Amount Due	Amount Paid	Payment Date	Type	Description
05/01/2014	\$1,773.00	\$370.00	03/06/2014	Loan payment	Check
04/01/2014	\$1,773.00	\$1,773.00	03/06/2014	Loan payment	Check
03/01/2014	\$1,773.00	\$1,773.00	02/10/2014	Loan payment	Check
02/01/2014	\$1,773.00	\$1,773.00	01/10/2014	Loan payment	Check
01/01/2014	\$1,773.00	\$1,773.00	12/16/2013	Loan payment	Check
12/01/2013	\$1,773.00	\$1,773.00	11/11/2013	Loan payment	Check
11/01/2013	\$1,773.00	\$1,773.00	10/07/2013	Loan payment	Check
10/01/2013	\$1,773.00	\$1,773.00	09/09/2013	Loan payment	Check
09/01/2013	\$1,773.00	\$1,773.00	08/09/2013	Loan payment	Check
08/01/2013	\$1,773.00	\$1,773.00	07/01/2013	Loan payment	Check

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Loan Transaction History



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MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 272694103

Bethel Greek Orthodox Church
5321 Valleydale Rd
Sioux City, IA 51104

For Loan 12311:

I'd like to see...

- ▶ Loan Details
- ▶ Automatic Payment Settings
- ▶ Payment History
- ▶ **Transaction History**

Online Loan Payments...

- ▶ Make a Payment

Loan Transactions All...

Transaction Number	Date	Description	Amount	Balance
2291229	03/06/2014	Loan interest due computation	\$91.65	\$126,179.62
2291229	03/06/2014	Regular loan payment	\$1,773.00	\$124,406.62
2288570	02/28/2014	Loan interest due computation	\$275.34	\$126,087.97
2283868	02/10/2014	Loan interest due computation	\$154.54	\$127,585.63
2283868	02/10/2014	Regular loan payment	\$1,773.00	\$125,812.63
2281202	01/31/2014	Loan interest due computation	\$324.97	\$127,431.09
2276255	01/10/2014	Loan interest due computation	\$156.43	\$128,879.12
2276255	01/10/2014	Regular loan payment	\$1,773.00	\$127,106.12
2265626	12/31/2013	Loan interest due computation	\$235.12	\$128,722.69
2260707	12/16/2013	Loan interest due computation	\$79.12	\$130,260.57

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Donation History

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Investments

Account Number	Investor	Balance
00000211	Nevada Presbytery	\$1,463,702.50
Total:		\$1,463,702.50

Loans

Account Number	Borrower	Balance
00000431	Nevada Presbytery	\$0.00
Total:		\$0.00

Donations for 2013

Date	Description	Amount
09/11/2013	0	\$150.00
09/11/2013	0	\$450.00
01/14/2013	7406000	\$300.00
Total:		\$900.00

Electronic Statements



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WELCOME ACCOUNTS STATEMENTS CONTACT US

Account Statements for

Document Number	Statement Date	Description	Account Number	For
34900	01/28/2014	1099 Stmts: 2013 Taxable Year	000010070	Account 000010070
35986	02/07/2014	Loan Pmt Rcpt 02/07/2014	000010123	Loan 3003
35987	02/07/2014	Loan Pmt Rcpt 02/07/2014	000010123	Loan 1008
34423	01/21/2014	Loan Pmt Rcpt 01/21/2014	000010123	Loan 3003
34581	01/28/2014	1099 Stmts: 2013 Taxable Year	000010123	Account 000010123
31202	01/03/2014	Loan Stmts: 12/01/2013 thru 12/31/2013	000010123	Loan 10123,1008
31244	01/03/2014	Loan Stmts: 12/01/2013 thru 12/31/2013	000010123	Loan 10123,3003
32983	01/07/2014	Loan Pmt Rcpt 01/07/2014	000010123	Loan 3003
32984	01/07/2014	Loan Pmt Rcpt 01/07/2014	000010123	Loan 1008
35678	02/03/2014	Loan Stmts: 01/01/2014 thru 01/31/2014	000010123	Loan 10123,1008
35720	02/03/2014	Loan Stmts: 01/01/2014 thru 01/31/2014	000010123	Loan 10123,3003
37184	03/03/2014	Loan Stmts: 02/01/2014 thru 02/28/2014	000010123	Loan 10123,1008
37226	03/03/2014	Loan Stmts: 02/01/2014 thru 02/28/2014	000010123	Loan 10123,3003
37415	03/07/2014	Loan Pmt Rcpt 03/07/2014	000010123	Loan 1008
37416	03/07/2014	Loan Pmt Rcpt 03/07/2014	000010123	Loan 3003
42534	04/07/2014	Loan Pmt Rcpt 04/07/2014	000010123	Loan 1008
42535	04/07/2014	Loan Pmt Rcpt 04/07/2014	000010123	Loan 3003
42989	04/11/2014	Loan Pmt Rcpt 04/11/2014	000010123	Loan 3003
43255	04/16/2014	Loan Pmt Rcpt 04/16/2014	000010123	Loan 3003



Transactional Online Access Version



Purchase a New Investment



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WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 00002460

New Covenant United Methodist Church
7191 Village Rd
Helena, AL 35080

For Account 00002460:

I'd like to...

▶ Purchase a New Investment

Investment Summary

Investment Number	Investment Type	Interest Rate	Maturity Date	Interest Paid YTD	Interest Payment Method	Available Balance	Investment Balance
133662	Three Year Flex Plus Variable	2.2097 %	2/14/2017	\$0.00	Compound, Semi-Annually	\$106,492.16	\$106,884.63

Page size: 10 11 items in 2 pages

Purchase a New Investment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 000002460

New Covenant United Methodist
Church
7191 Village Rd
Helena, AL 35080

Investment Application: State Of Residence

Please select your state of residence and click Next:

Alabama ▼

Cancel

Next



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 000002460

New Covenant United Methodist Church
7191 Village Rd
Helena, AL 35080

Investment Application: Offering Circular and Agreements

As part of your online investment purchase application, you will need to read the documents by clicking on each of the "View" buttons.

Offering Circular

Click the button below to view the Offering Circular.

View Offering Circular

By checking this box, I agree that I have read and understand the Offering Circular.

Privacy Policy

Click the button below to view the Privacy Policy.

View Privacy Policy

Here's the latest agreement.

Electronic Signature Agreement

Click the button below to view the Electronic Signature Agreement.

View Electronic Signature

By checking this box, I agree that I have read and understand the Electronic Signature Agreement.

Cancel

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Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 000002460

New Covenant United Methodist Church
7191 Village Rd
Helena, AL 35080

Investment Application: Investment Type and Funding

Select One	Description	Minimum Deposit	Current Rate
<input type="radio"/>	Demand Plus Note - \$50.00 minimum *	\$50.00	0.25 %
<input type="radio"/>	Kid Builder Note - \$20.00 minimum	\$20.00	3.75 %
<input type="radio"/>	Education Growth Note - \$100.00 minimum	\$100.00	2.08 %
Term Plus Notes			
<input checked="" type="radio"/>	12 Month Note - \$100.00 minimum	\$100.00	0.50 %
<input type="radio"/>	18 Month Note - \$100.00 minimum	\$100.00	0.75 %
<input type="radio"/>	24 Month Note - \$100.00 minimum	\$100.00	1.00 %
<input type="radio"/>	30 Month Note - \$100.00 minimum	\$100.00	1.25 %
<input type="radio"/>	Green 30 Month Note - \$100.00 minimum (All electronic correspondence)	\$100.00	1.50 %
<input type="radio"/>	36 Month Note - \$100.00 minimum	\$100.00	1.75 %
<input type="radio"/>	48 Month Step Up Note - \$100.00 minimum	\$100.00	2.00 %
<input type="radio"/>	48 Month Note - \$100.00 minimum	\$100.00	2.25 %
<input type="radio"/>	60 Month Step Up Note - \$100.00 minimum	\$100.00	3.00 %

* Interest rates are established according to the policies set forth in the Offering Circular and are subject to change.

Investment amount:

- I will send a check.
- Deduct funds electronically from my bank account.

* Please review the Offering Circular for special considerations in your state.

Cancel

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Purchase a New Investment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 000002460

New Covenant United Methodist
Church
7191 Village Rd
Helena, AL 35080

Investment Application: Distribution of Interest

Distribution of Interest Options:

Please select one of the options below indicating how investment interest is to be distributed.

- Compound all interest to my investment note Monthly.
- Pay interest to me... Monthly
- Pay interest to one or more third parties... Monthly

Cancel

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Purchase a New Investment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 000002460

New Covenant United Methodist
Church
7191 Village Rd
Helena, AL 35080

Investment Application: Acknowledgement

Account owner: **New Covenant United Methodist**
Address: **7191 Village Rd
Helena, AL 35080**
Taxpayer Identification Number: **89-1180695**

By checking this box, I (we) hereby acknowledge receipt of the Offering Circular of DDI Inc. and further represent that I (we) meet the definition of "Investor" as presented in the Offering Circular and accept the terms of the Offering Circular. This page serves as a substitute W-9. Further, under penalties of perjury, I (we) certify (1) that the number shown on this page is my (our) correct taxpayer identification number, and (2) that I (we) are not subject to backup withholding because (a) I (we) have not been notified that I (we) are subject to backup withholding as a result of a failure to report all interest or dividends, or (b) the Internal Revenue Service has notified me (us) that I (we) are no longer subject to backup withholding. For more detailed information on form W-9 or backup withholding, visit www.IRS.gov.

By checking this box and clicking the "Next" button, I agree that I have read and understand the Acknowledgement above.

Cancel

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Purchase a New Investment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 000002460

New Covenant United Methodist
Church
7191 Village Rd
Helena, AL 35080

Investment Application: EFT Authorization

Bank account for funding your investment:

Bank name	Cash
Routing number	123123123
Account number	12345
Account type	Checking

I desire to have DDI Inc. process any specific request for electronic transfers for transfer to and/or from my account at the bank indicated below.

Cancel

Previous

Submit

Purchase a New Investment



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Account #: 000002460

New Covenant United Methodist
Church
7191 Village Rd
Helena, AL 35080

Thank you for investing with DDI Inc.

Your investment will be earning competitive interest rates and will be providing funds to help churches grow.

We are processing your investment now.

Note: It may take 2 business days for your investment to be approved.

You have elected to fund your investment via an Electronic Funds Transfer from your bank account.

The amount of \$500.00 will be withdrawn from your account in the next 2 business days.

A copy of your investment application will be sent to you via E-Mail.

If you DO NOT receive an E-Mail within 15 minutes, please contact us:

Toll Free Phone: 317.713.2480

Email: support@ddi.org

[View Investment Application](#)

Setup a Recurring Investment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

For Investment 136757 :


I'd like to...

- ▶ Setup Recurring Investment
- ▶ Make an Investment Deposit

Investment 136757 Details

Investment Type	Demand Notes II - Var
Interest Rate	0.3750 %
Purchase Date	Monday, March 17, 2014
Maturity Date	On Demand
Available Balance	\$5,000.00
Accrued Interest	\$0.00
Account Value	\$5,000.00
Taxable Interest Reported YTD	\$0.00
Interest Withheld YTD	\$0.00

Setup a Recurring Investment


Serving those who serve others

Welcome . . . **Peyton Manning**

[WELCOME](#) [ACCOUNTS](#) [STATEMENTS](#) [CONTACT US](#)

Recurring Investment: Electronic Funds Transfer Setup

Enabled Demand Plus Note - \$50.00 minimum

[Click here to disable recurring investment.](#)

Investment frequency: Biweekly (every two weeks) Monthly Semimonthly (twice a month) Weekly

Date of next investment:

Investment amount:

Name of bank:

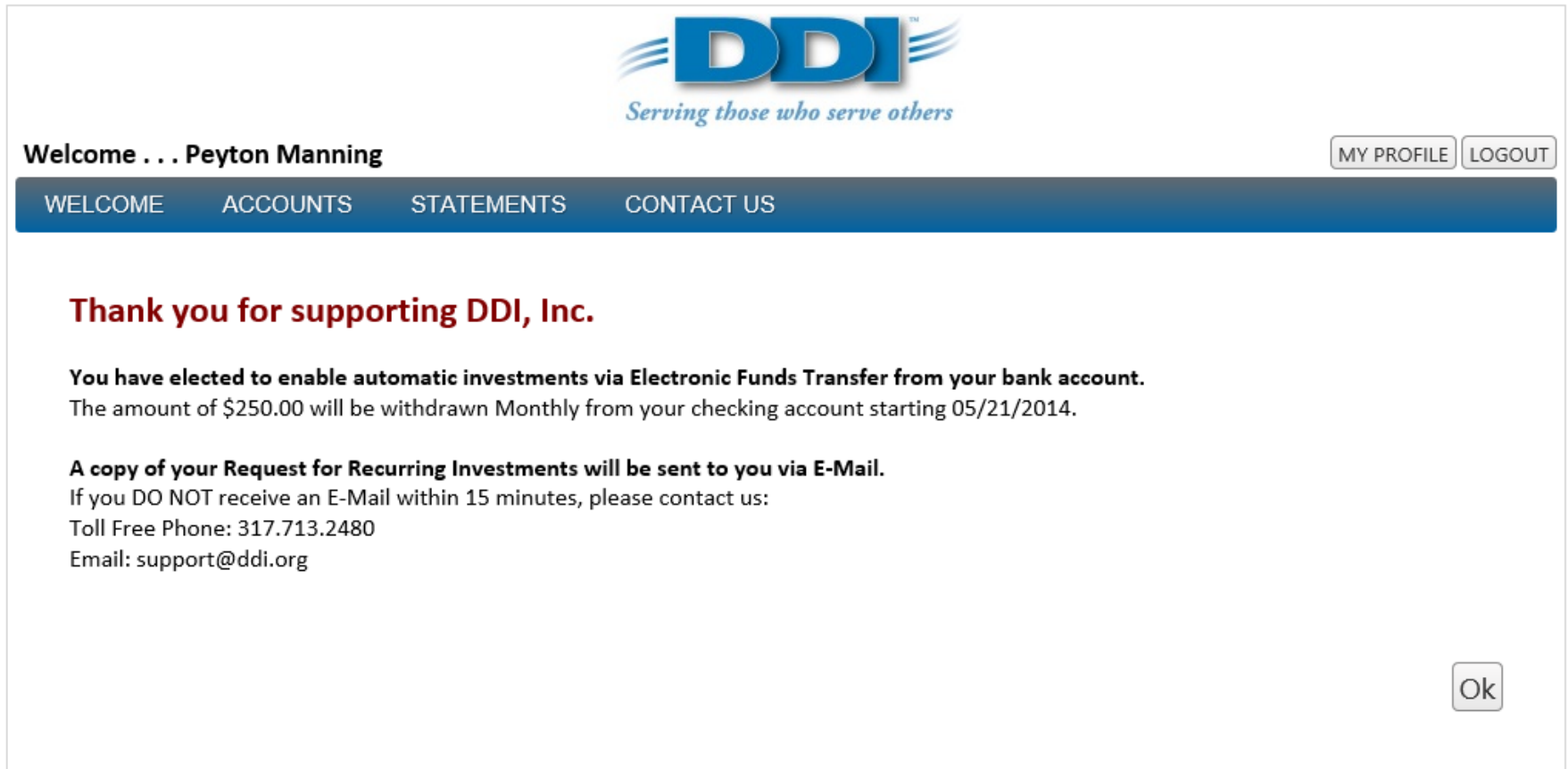
Routing number:

Bank account number:

Checking Savings

I desire to have DDI Inc. process any specific request for electronic transfers for transfer to and/or from my account at the bank indicated below.

Setup a Recurring Investment



The screenshot displays the DDI user interface. At the top center is the DDI logo with the tagline "Serving those who serve others". To the left, it says "Welcome . . . Peyton Manning". To the right are buttons for "MY PROFILE" and "LOGOUT". Below this is a dark blue navigation bar with links for "WELCOME", "ACCOUNTS", "STATEMENTS", and "CONTACT US". The main content area features a red heading "Thank you for supporting DDI, Inc." followed by a bold confirmation message: "You have elected to enable automatic investments via Electronic Funds Transfer from your bank account. The amount of \$250.00 will be withdrawn Monthly from your checking account starting 05/21/2014." Below this is another bold message: "A copy of your Request for Recurring Investments will be sent to you via E-Mail." followed by contact information: "If you DO NOT receive an E-Mail within 15 minutes, please contact us: Toll Free Phone: 317.713.2480 Email: support@ddi.org". An "Ok" button is located in the bottom right corner of the message box.

DDI™
Serving those who serve others

Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Thank you for supporting DDI, Inc.

You have elected to enable automatic investments via Electronic Funds Transfer from your bank account.
The amount of \$250.00 will be withdrawn Monthly from your checking account starting 05/21/2014.

A copy of your Request for Recurring Investments will be sent to you via E-Mail.
If you DO NOT receive an E-Mail within 15 minutes, please contact us:
Toll Free Phone: 317.713.2480
Email: support@ddi.org

Ok

Setup a One-Time Deposit



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

For Investment 136758 :

I'd like to...

- ▶ Setup Recurring Investment
- ▶ **Make an Investment Deposit**

Investment 136758 Details

Investment Type	Demand Notes II - Var
Interest Rate	0.3750 %
Purchase Date	Monday, March 17, 2014
Maturity Date	On Demand
Available Balance	\$10,000.00
Accrued Interest	\$0.00
Account Value	\$10,000.00
Taxable Interest Reported YTD	\$0.00
Interest Withheld YTD	\$0.00

Setup a One-Time Deposit



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Investment Deposit: State Of Residence

Please select your state of residence and click Next:

Colorado ▼

Cancel

Next

Setup a One-Time Deposit

Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME

ACCOUNTS

STATEMENTS

CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Investment Deposit: Offering Circular and Agreements

As part of your online investment purchase application, you will need to read the documents by clicking on each of the "View" buttons.

Offering Circular

Click the button below to view the Offering Circular.

[View Offering Circular](#)

By checking this box, I agree that I have read and understand the Offering Circular.

Privacy Policy

Click the button below to view the Privacy Policy.

[View Privacy Policy](#)

Here's the latest agreement.

Electronic Signature Agreement

Click the button below to view the Electronic Signature Agreement.

[View Electronic Signature](#)

By checking this box, I agree that I have read and understand the Electronic Signature Agreement.

[Cancel](#)

[Previous](#)

[Next](#)

Setup a One-Time Deposit



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Investment Deposit: Investment Amount

Investment amount:

* Please review the Offering Circular for special considerations in your state.

Cancel

Previous

Next

Setup a One-Time Deposit



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Investment Deposit: Acknowledgement

Account owner: **Peyton Manning**
Address: **123 Broncos Colts Way
Denver, CO 80123**
Taxpayer Identification Number: **123-45-6789**

By checking this box, I (we) hereby acknowledge receipt of the Offering Circular of DDI Inc. and further represent that I (we) meet the definition of "Investor" as presented in the Offering Circular and accept the terms of the Offering Circular. This page serves as a substitute W-9. Further, under penalties of perjury, I (we) certify (1) that the number shown on this page is my (our) correct taxpayer identification number, and (2) that I (we) are not subject to backup withholding because (a) I (we) have not been notified that I (we) are subject to backup withholding as a result of a failure to report all interest or dividends, or (b) the Internal Revenue Service has notified me (us) that I (we) are no longer subject to backup withholding. For more detailed information on form W-9 or backup withholding, visit www.IRS.gov.

By checking this box and clicking the "Next" button, I agree that I have read and understand the Acknowledgement above.

Cancel

Previous

Next

Setup a One-Time Deposit



Welcome . . . Peyton Manning

[MY PROFILE](#) [LOGOUT](#)

[WELCOME](#) [ACCOUNTS](#) [STATEMENTS](#) [CONTACT US](#)

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Investment Deposit: Fund Investment by EFT

1,000.00 will be withdrawn from the following bank account and deposited into your Demand Plus Note - \$50.00 minimum *.

Date of withdrawal:

Name of bank:

Routing number:

Bank account number:

Type of account: Checking Savings

[Cancel](#)

[Previous](#)

[Next](#)

Setup a One-Time Deposit



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Investment Deposit: EFT Authorization

Bank account for funding your investment:

Date of withdrawal	Monday, 04/21/2014
Bank name	Chase
Routing number	123123123
Account number	1234
Account type	Checking

I desire to have DDI Inc. process any specific request for electronic transfers for transfer to and/or from my account at the bank indicated below.

Cancel

Previous

Submit

Setup a One-Time Deposit



Welcome . . . Peyton Manning

[MY PROFILE](#) [LOGOUT](#)

[WELCOME](#)

[ACCOUNTS](#)

[STATEMENTS](#)

[CONTACT US](#)

Account #: 990051150

Peyton Manning
123 Broncos Colts Way
Denver, CO 80123

Thank you for investing with DDI Inc.

Your investment will be earning competitive interest rates and will be providing funds to help churches grow.

We are processing your investment now.

Note: It may take 2 business days for your investment to be approved.

You have elected to fund your investment via an Electronic Funds Transfer from your bank account.

The amount of \$1,000.00 will be withdrawn from your account in the next 2 business days.

A copy of your investment application will be sent to you via E-Mail.

If you DO NOT receive an E-Mail within 15 minutes, please contact us:

Toll Free Phone: 317.713.2480

Email: support@ddi.org

[View Investment Deposit](#)

Make a Loan Payment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Account #: 272694103

Bethel Greek Orthodox Church
5321 Valleydale Rd
Sioux City, IA 51104

For Loan 12311:

I'd like to see...

- ▶ Loan Details
- ▶ Automatic Payment Settings
- ▶ Payment History
- ▶ Transaction History

Online Loan Payments...

- ▶ Make a Payment

Loan 12311 Details

Payment Information

Payments	Regular	Special	Escrow
Amount	\$1,773.00	\$0.00	\$0.00
Frequency	Monthly	None	
Due Date	Thursday, 05/01/2014		

Detailed Information

Loan Status	Loan fully advanced, making regular pmt
Interest Rate	4.4317 %
Maturity Date	Thursday, 10/01/2015
Rate Adjust Date	Thursday, 10/01/2015
Amortization Date	Thursday, 04/01/2021

Make a Loan Payment

Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Online Loan Payment - Setup

Loan number: 12311

Previous payment: \$1,773.00 on 3/6/2014

Regular payment amount: \$1,773.00

Current amount due:

Principal: \$1,085.79


Interest: \$317.21

Late fee: \$0.00

Other fees: \$0.00

Total amount due: \$1,403.00

Due date: 5/1/2014

Payment date: 04/24/2014 

Payment amount: \$1,403.00

Extra principal: \$597.00 

Total payment amount: \$2,000.00

Name of bank: Chase

Routing number: 123123123 

Bank account number: 1234 

Checking Savings

Paying extra principal does **NOT** affect the next payment due date.

Cancel

Next

Make a Loan Payment



Welcome . . . Peyton Manning

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

Online Loan Payment - Confirmation

Loan number: 12311

Current amount due: \$1,403.00

Due date: 05/01/2014

Please review your loan payment information, check the box below if you approve, then click the "Submit" to process your payment.

Otherwise, click "Previous" to edit your loan payment, or click "Cancel" if you do not want to process a payment at this time.

Payment date	04/24/2014
Payment amount	\$2,000.00
Name of bank	Chase
Routing number	123123123
Bank account number	1234
Account type	Checking

I desire to have DDI Inc. process any specific request for electronic transfers for transfer to and/or from my account at the bank indicated below.

Cancel

Previous

Submit

Make a Loan Payment



Welcome . . . Peyton Manning

[MY PROFILE](#) [LOGOUT](#)

- [WELCOME](#)
- [ACCOUNTS](#)
- [STATEMENTS](#)
- [CONTACT US](#)

Thank you. Your loan payment has been successfully scheduled.

Loan number	12311
Payment date	04/24/2014
Payment amount	\$2,000.00
Paid from	Chase Checking 1234

Auto Enrollment



HOME

LOGIN

REGISTER

CONTACT US

Registration

Please click on one of the following to begin:

I have an activation code.

I am an individual investor.

You will need your account ID.

I am a church or organization investor.

Auto Enrollment


HOME LOGIN REGISTER CONTACT US

Registration

Personal Information

First Name: Last Name:

SSN:

Date of Birth: 

Mailing Address

Address or PO Box:

City: State: Zip Code:

Account ID

Enter your Account ID or Registration PIN as shown on your 1099 or investment certificate.
This is normally a nine-digit number.

Cancel Next



Future Enhancements

Discussion, Questions, Comments



Patrick McHugh
pmchugh@ddi.org
317.713.2472