



TRANSFER BETWEEN ACCOUNTS

To transfer funds between two United Church Funds accounts, provide the following information.
Requests received by noon on a regular business day are processed on the next business day.

1. Transfer from account —
ACCOUNT NAME

ACCOUNT NUMBER

Transfer to account —
ACCOUNT NAME

ACCOUNT NUMBER

2. Transfer from —

Transfer to —

If the account from which funds are to be withdrawn is allocated among two or more investment options, indicate the amount to be withdrawn from each fund. Similarly, indicate the amount to be deposited into the selected investment option(s).

Cash & Equivalent \$ _____
Fixed Income \$ _____
Domestic Core Equity \$ _____
Small Cap Equity \$ _____
International Equity \$ _____
Total Equity \$ _____
Conservative Balanced \$ _____
Moderate Balanced \$ _____
Aggressive Balanced \$ _____
Beyond Fossil Fuels \$ _____
B. Fossil Fuels Balanced \$ _____
TOTAL \$ _____

Cash & Equivalent \$ _____
Fixed Income \$ _____
Domestic Core Equity \$ _____
Small Cap Equity \$ _____
International Equity \$ _____
Total Equity \$ _____
Conservative Balanced \$ _____
Moderate Balanced \$ _____
Aggressive Balanced \$ _____
Beyond Fossil Fuels \$ _____
B. Fossil Fuels Balanced \$ _____
TOTAL \$ _____

3. Transfer Authorization

NAME _____

DAY PHONE _____

EMAIL _____

SIGNATURE _____