



## TRANSACTION FORM

To transfer funds among UCF accounts, please provide the following information. Transactions are processed in 3-5 business days. Send completed form to UCF's Client Services team at [info@ucfunds.org](mailto:info@ucfunds.org).

**1. PROVIDE UCF ACCOUNT INFORMATION (all required fields)**

Date of Request: \_\_\_\_\_ Account Number: \_\_\_\_\_

Account Name: \_\_\_\_\_ Transfer Bank Account (Last 4 Digits): \_\_\_\_\_

**2. SELECT ONE OF THE FOLLOWING OPTIONS:**

- Deposit to UCF Account
  Withdrawal from UCF Account

**3. DOLLAR AMOUNT OF TRANSACTION:** \_\_\_\_\_

**4. SELECT THE UCF INVESTMENT FUND(S) TO WHICH YOU WISH THE TRANSACTION TO APPLY:**

- We elect to have this transaction prorated across our current portfolio (if checked, skip to step #5).  
 We elect to have this transaction allocated to/from the following investment funds:

	Dollar Amount (\$)	OR	Percentage (%)
UCF Balanced Fund	_____		_____
UCF Beyond Fossil Fuels Balanced Fund	_____		_____
UCF Alternatives Balanced Fund *	_____		_____
UCF Total Equity Fund	_____		_____
UCF Fixed Income Fund	_____		_____
UCF Domestic Core Equity Fund	_____		_____
UCF Beyond Fossil Fuels Equity Fund	_____		_____
UCF International Equity Fund	_____		_____
UCF Small Cap Equity Fund	_____		_____
UCF Alternatives Fund * *	_____		_____
UCF Cash & Equivalents Fund	_____		_____
<b>TOTALS</b>	_____		_____

\* UCF Alternatives Balanced Fund offers monthly liquidity and will be processed accordingly.  
 \*\* UCF Alternatives Fund offers quarterly liquidity and will be processed accordingly.

## 5. AUTHORIZATION INFORMATION

Authorized Officer Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Organization Name: \_\_\_\_\_ City and State: \_\_\_\_\_

Officer Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Please contact United Church Funds with questions by email at [info@ucfunds.org](mailto:info@ucfunds.org) or by phone at 877-806-4989.  
Thank you for the opportunity to be of service to your organization!