



**United Church Funds**  
Investing Together for a Sustainable World

## TRANSFER AMONG ACCOUNTS

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 THE UCF ACCOUNT INFORMATION (all required fields)

Date of Request: \_\_\_\_\_

From Account Number: \_\_\_\_\_ Account Name: \_\_\_\_\_

To Account Number: \_\_\_\_\_ Account Name: \_\_\_\_\_

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

Below please indicate a dollar amount OR percentage to/from both accounts.

	<u>Current Account</u>	TO	<u>Receiving Account</u>
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.

### 3. 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!