



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.

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 | _____ | | _____ |
| TOTALS | _____ | | _____ |

* 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 or by phone at 877-806-4989. Thank you for the opportunity to be of service to your organization!