

## TRANSFER AMONG ACCOUNTS

To transfer funds among UCF accounts, please provide the following information. Once complete instructions are sent, 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 (please indicate if it is recurring): \_\_\_\_\_

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

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

### 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: \_\_\_\_\_ Officer Email: \_\_\_\_\_