



Pax World Mutual Funds

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Individual Retirement Account (IRA) Qualified Charitable Distribution Form

Complete this form to request a Qualified Charitable Distribution (QCD) from your Pax World Traditional IRA or Roth IRA account if you are age 70½ or older. DO NOT use this form for any other distribution. For help filling out this form please call 800.372.7827 between 8AM and 6PM ET M-F.

You are eligible to make distributions from your IRA payable to an eligible charitable organization without having to count the distributions as taxable income only if **all** of the following are true:

- You are age 70½ or older at the time of the distribution. Distributions from an Inherited IRA are permissible if the beneficial owner is 70½ or older.
- The amount of all distributions does not exceed \$100,000.
- The distribution is from a Traditional or Roth IRA. (The distribution cannot be made from a SEP-IRA or SIMPLE IRA to which you contributed during the year of the distribution.)
- The distribution is for an amount that would otherwise be taxable, unless from a Roth IRA (i.e., pre-tax contributions and earnings).
- The distribution is being made directly from your Pax World account to the charity. (This includes checks payable to the charity and sent to your address of record.)
- The recipient charity is qualified as a 501(c)(3) organization per IRS regulations. Certain charities such as donor-advised funds, charitable remainder trusts, and private foundations are excluded.
- Written receipt is obtained from each recipient charity.

You are responsible for confirming your eligibility. For more information about the rules of charitable distributions from an IRA, please consult your tax adviser.

1. IRA Owner Information

First Name (please print name exactly as it appears on IRA account)		Middle Initial	Last Name
Account Number	Birthdate (mm/dd/yyyy)		
Mailing Address	City	State	Zip Code
()			
Contact Telephone	Email Address		

Check here if contact information above is new.

Type of Account:

- Traditional IRA
 Roth IRA
 Inherited IRA

2. Qualified Charitable Distribution Amount

- Calculate and distribute my **current** year required minimum distribution (RMD) upon receipt of this form. I understand that I am responsible for contacting the fund to request any future year RMD amounts.

The RMD amount is determined by Internal Revenue Service (IRS) regulations. These regulations are explained in IRS Publication 590B, "Distributions from Individual Retirement Arrangements (IRAs)", which incorporates updated Life Expectancy Tables. Each RMD will be calculated based on the Uniform Lifetime Table, unless the following exception applies to you and you have indicated so by checking the box below.

- My sole primary beneficiary is my spouse who is more than 10 years younger than I am. I elect to calculate the RMD based on the life expectancy from the Joint and Last Survivor Table.

Beneficiary's date of birth _____
(mm/dd/yyyy) (required)

Distribute a one time fixed amount : \$ _____ or _____ shares upon receipt of this form.

Note: If you own multiple Pax World Funds, redemption will occur in each fund unless you indicate specific funds below. The percentage must total 100%. If specific funds are chosen, but percentage is not provided, we will redeem equal portions from each fund listed.

Fund Name: _____ Percentage: _____ %

Fund Name: _____ Percentage: _____ %

Fund Name: _____ Percentage: _____ %

3. Charitable Organization

The charity must be a qualified charity, as defined in section 170(b)(1)(A) of the Internal Revenue Code. **(Medallion Signature Guarantee is required (see below)).**

Make check payable to: _____
 Name of Charitable Organization

We will send the check to your address of record for you to send to the charity. This ensures that the charity recognizes you as the contributor and gives you the written receipt required by the IRS.

4. Withholding

Per the IRS rules surrounding QCD, no withholding will be applied. Amounts withheld for taxes aren't sent to the charity and don't qualify as a charitable distribution.

5. Signature

I certify that I am the participant authorized to make these elections and that all information provided is true and accurate. I further certify that no tax or legal advice has been given to me by the Custodian, Pax World Mutual Funds or any agent of either of them, and that all decisions regarding the elections made on this form are my own. The Custodian is hereby authorized and directed to distribute funds from my account in the manner requested. The Custodian may rely on this certification and authorization without further investigation or inquiry. I expressly assume responsibility for any adverse consequences that may arise from the election(s) and agree that the Custodian, Pax World Mutual Funds and their agents shall in no way be responsible and shall be indemnified and held harmless, for any tax, legal or other consequences of the elections made on this form. **I have read and understand and agree to be legally bound by the terms of this form. This form may only be used for one account. If you have another account from which you wish to take distributions, please fill out a separate form.**

 Participant's Signature (or Beneficiary's signature if participant is deceased) | _____
 Date

Medallion Signature Guarantee (if required): An eligible guarantor is a domestic bank or trust company, securities broker/dealer, clearing agency or savings association that participates in a Medallion Program recognized by the Securities Transfer Agents Association. The three recognized medallion programs are the Securities Transfer Agents Medallion Program (known as STAMP), Stock Exchange Medallion Program (SEMP), and the Medallion Signature Program (MSP). A notarization from a notary public is NOT an acceptable substitute for a signature guarantee.

Medallion Signature Guarantee