



Pax World Mutual Funds

Regular mail:
Pax World Funds
PO Box 9824
Providence RI 02940-8024

Overnight mail:
Pax World Funds
4400 Computer Drive
Westborough MA 01581-1722
Telephone: 1(800) 372-7827

Individual Retirement Account (IRA) Qualified Charitable Distribution Form

Use this form to request a Qualified Charitable Distribution (“QCD”) from your IRA or beneficiary inherited IRA. Retirement plan participants or their beneficiaries who have attained age 70½ or older, may make tax-free distributions from a Traditional or Roth IRA and donate the amount distributed to an eligible tax-exempt charitable organization. **DO NOT use this form for any other distribution. Pax World requires a shareholder to obtain a Medallion Signature Guarantee (MSG) stamp when using this form. For help filling out this form please call 1(800) 372-7827 between 8AM and 6PM ET M-F.**

The total of all QCDs for a single tax year cannot exceed \$100,000. The QCD amount can be used toward satisfying your Required Minimum Distribution (“RMD”) for the tax year. The QCD will be reported to the IRS on Form 1099-R as a normal distribution (Code 7) based on your age. You must document the tax-free qualification to the Internal Revenue Service “IRS” on your Federal income tax return (Form 1040). Please visit the IRS web site www.irs.gov, or contact a professional tax advisor for more information.

1. Participant 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: (excluding SEP or SIMPLE IRAs)

- Traditional/Rollover IRA Roth IRA Beneficiary Inherited Traditional IRA Beneficiary Inherited Roth IRA

2. Distribution Instructions - (Complete sections A and B)

The total of all Qualified Charitable Distributions for a single tax year cannot exceed \$100,000.

A. Distribution Amount: (Not to exceed the allowable limit of \$100,000.)

- Use my calculated RMD amount - If the calculated amount exceeds the \$100,000 limit, your request will be rejected. 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)

- Process a partial distribution of \$ _____
- Liquidate entire account.

Note: Federal tax withholding is not required from a QCD and will not be withheld from the distribution amount.

B. Distribution Method:

Distribute proportionately across all funds, (or)

Distribute as indicated below:

Fund Name: _____ Percentage: _____ %

Fund Name: _____ Percentage: _____ %

Fund Name: _____ Percentage: _____ %

3. Payment and Mailing Instructions

Charitable Organization

Amount: _____ % of the distribution proceeds (or) specific dollar amount \$ _____

Name of Charity

To the Attention of

Address

_____|_____|_____
City State Zip Code

Choose one: Mail to my address currently on file. I will forward the proceeds to the charity.
 Mail directly to the charity. I will contact the charity to ensure I receive the acknowledgement required by the IRS.

Charitable Organization

Amount: _____ % of the distribution proceeds (or) specific dollar amount \$ _____

Name of Charity

To the Attention of

Address

_____|_____|_____
City State Zip Code

Choose one: Mail to my address currently on file. I will forward the proceeds to the charity.
 Mail directly to the charity. I will contact the charity to ensure I receive the acknowledgement required by the IRS.

Check this box - if you have attached a request for additional charities.

4. Participant Authorization

I certify that I am the Participant authorized to make this election and that all information provided is true and accurate. I further certify that the Custodian, the Fund, or any agent of either of them has given no tax or legal advice to me, 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 and shall be indemnified and held harmless, for any tax, legal or other consequences of the election(s) made on this form. The Custodian may conclusively rely on this certification and authorization without further investigation or inquiry.

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

Date

*** Medallion Signature Guarantee Stamp and Signature:** (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 Exchanges 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**