



Pax World Mutual Funds

Regular mail:
Pax World Mutual Funds
PO Box 55370
Boston MA 02205-5370

Overnight mail:
Pax World Mutual Funds
c/o BFDS
30 Dan Road, Suite #55370
Canton, MA 02021-2809
Telephone: 800.372.7827

Recharacterization Form (Internal)

Use this form to recharacterize a conversion or contribution between a Pax World Roth and Pax World Traditional IRA. New accounts require an appropriate account application. If you have any questions, please call 800.372.7827 between 8AM and 6PM ET M-F.

1. Personal Information

Name (please print name exactly as it appears on your current IRA account)		Social Security/Tax ID No.	
Mailing Address	City	State	Zip Code
Birthdate (mm/dd/yyyy)	Contact Telephone	Email Address	

Check here if contact information above is new.

2. Instructions

If you do not have an existing Roth or Traditional IRA you must complete the appropriate application. Funds will be recharacterized into a new account in the same fund, not the previously existing account. Earning associated with the recharacterization are calculated according to Internal Revenue Service (IRS) regulations, not actual earnings since the time of deposit. All transactions are reportable to the IRS.

Recharacterize the indicated conversion contribution plus allocable earnings from my Roth IRA to a Traditional IRA

Date of Conversion: _____ Dollar Amount Converted: \$ _____
Deposit into Fund/Share Class: _____ Current Account No: _____

Recharacterize the indicated annual contribution plus allocable earnings from (Check the appropriate box)

Roth IRA to a Traditional IRA

Traditional IRA to a Roth IRA

Date of Contribution: _____ Dollar Amount Contributed: \$ _____
Deposit into Fund/Share Class: _____ Current Account No : _____

3. Certification and Signature

I authorize and request that Pax World Mutual Funds and State Street Bank & Trust Company, the IRA custodian, make the above requested recharacterization from the named Pax World Mutual Funds IRA and purchase the recharacterization contribution to a new IRA in the same fund.

I certify that I am the depositor 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 by 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 own account in the manner requested. The Custodian may conclusively rely on this certification and authorization without further investigation or inquiry. I expressly assume responsibility for any adverse consequences which 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 election(s) made on this form.

I have read and understand and agree to be legally bound by the terms of this form.

Signature of Depositor	Date
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