



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
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SIMPLE IRA Rollover Certification

Use this form ONLY if you have received an eligible distribution from your current SIMPLE IRA and are depositing those funds into your Pax World SIMPLE IRA. You must complete the rollover within 60 calendar days of your receipt of that distribution. For help with filling out this form please call 800.372.7827 between 8AM and 6PM ET M-F.

1. Personal Information

First Name	Middle Initial	Last Name	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. Type of Rollover Contribution

Pax World SIMPLE IRA Account Number (if applicable) _____
 (If you are establishing a new Pax World SIMPLE IRA you must also complete a SIMPLE IRA Application).

- SIMPLE IRA Rollover - A distribution from a SIMPLE IRA which is being rolled over into your Pax World SIMPLE IRA within 60 days of receipt. Note that 365 days must have passed since you last received a rollover distribution from the distributing SIMPLE IRA.

70½ Rollover Restriction (Please check one)

- I am not nor will be 70½ or older in this calendar year.
- I am or will be 70½ or older in this calendar year. I understand that I may not rollover any amounts required to be distributed under Internal Revenue Code Sections 408(a)(6) and 401(a)(9).

3. Investment Instructions

Amount of Rollover \$ _____

Please purchase into the following fund(s):

- Pax Large Cap Fund \$ _____ or _____ % Individual Class (3050)
- Pax Mid Cap Fund \$ _____ or _____ % Individual Class (3043)
- Pax Small Cap Fund \$ _____ or _____ % Individual Class (3048); Class A (3098)
- Pax ESG Beta® Quality Fund \$ _____ or _____ % Individual Class (3042); Class A (3092)
- Pax ESG Beta® Dividend Fund \$ _____ or _____ % Individual Class (3041)
- Pax MSCI EAFE ESG Leaders Index Fund \$ _____ or _____ % Individual Class (3047)
- Pax Ellevest Global Women’s Index Fund \$ _____ or _____ % Individual Class (3046)
- Pax Global Environmental Markets Fund \$ _____ or _____ % Individual Class (3049); Class A (3099)

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Pax Balanced Fund \$ _____ or _____ % Individual Class (3040)

Pax Core Bond Fund \$ _____ or _____ % Individual Class (3045)

Pax High Yield Bond Fund \$ _____ or _____ % Individual Class (3044);
 Class A (3094)

4. Certification

I certify that the contribution described above is an eligible SIMPLE IRA rollover contribution and that I am rolling over this contribution within 60 calendar days of my receipt of that distribution. I understand that this rollover is irrevocable and involves important tax considerations.

I agree that I am solely responsible for all tax consequences of this rollover contribution. I also agree neither the IRA custodian nor Pax World Mutual Funds shall have any responsibility for any such tax consequences. I understand that restrictions regarding subsequent rollovers of this rollover contribution may also apply.

I have read and understand and agree to be legally bound by the terms of this form. I also understand that the IRA custodian will rely on this form when accepting my rollover contribution. I understand that this rollover is irrevocable and may not be reversed in the future. I also understand that I am responsible for the movement of the rollover to my successor IRA, and that neither UMB Bank, n.a., Boston Financial Data Services nor Pax World Mutual Funds have any duty to enforce the collection of any assets to be rolled over to my Pax World SIMPLE IRA.

 Depositor's Signature

 Date