



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 Transfer of Assets

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. Please tell us where to invest. Complete items A and B

A. I am opening a new account(s) and have attached the required application or documents.

Deposit the proceeds into my existing SIMPLE IRA account # _____

B. Please purchase into the following fund(s):

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|--|----------|------------|--|
| Pax Large Cap Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3050) |
| Pax Mid Cap Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3043) |
| Pax Small Cap Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3048);
<input type="checkbox"/> Class A (3098) |
| Pax ESG Beta® Quality Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3042);
<input type="checkbox"/> Class A (3092) |
| Pax ESG Beta® Dividend Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3041) |
| Pax MSCI EAFE ESG Leaders Index Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3047) |
| Pax Ellevest Global Women's Index Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3046) |
| Pax Global Environmental Markets Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3049);
<input type="checkbox"/> Class A (3099) |
| Pax Balanced Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3040) |
| Pax Core Bond Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3045) |
| Pax High Yield Bond Fund | \$ _____ | or _____ % | <input type="checkbox"/> Individual Class (3044);
<input type="checkbox"/> Class A (3094) |

3. Please tell us about your current plan and authorize the transfer from your current custodian.

- To avoid delays, check with your current custodian for their correct address and if they require a Medallion Signature Guarantee.
- If possible attach a copy of a current statement.

Only SIMPLE IRA Assets should be Transferred.

 Name of Current Custodian or Agent

 Mailing Address of Current Custodian or Agent City State Zip Code

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Daytime Telephone of Custodian

1. Fund Name or Type of Investment to be transferred: _____

Account Number for Investment 1: _____ Entire Account Partial \$: _____For Certificates of Deposit Immediately At Maturity (Date: _____)

2. Fund Name or Type of Investment to be transferred: _____

Account Number for Investment 2: _____ Entire Account Partial \$: _____For Certificates of Deposit Immediately At Maturity (Date: _____)

I authorize the liquidation and transfer of assets to my Pax World SIMPLE IRA and authorize Pax World Mutual Funds and UMB Bank, n.a. to process this request on my behalf. I understand it is my responsibility to assure the prompt transfer of assets by the current custodian.

I have read and understand all information in the instructions.

 Signature of Depositor

 Date

Medallion Signature Guarantee (if required by your current custodian): 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

Instructions to Shareholders (Please Read Carefully).

This form will be used by UMB Bank, n.a. to initiate a Transfer of Assets on your behalf from an existing SIMPLE IRA as designated on this form to your SIMPLE IRA at Pax World Mutual Funds. If you are over 70½ please advise us if you wish to take required distributions from this account and what your distribution election is; otherwise no action will be taken on our part. Please remember this Transfer of Assets can only occur between SIMPLE IRA accounts. For certificate of deposits please indicate if you wish to have the funds transferred immediately, which may incur a redemption penalty if they have not matured, or at maturity. We cannot accept requests to transfer assets from certificates more than 60 days prior to their maturity. When completed, please return the signed form, a copy of your current account statement, and the appropriate new account application for your SIMPLE IRA, if required, to:

First Class Mail:
 Pax World Mutual Funds
 PO Box 55370
 Boston MA 02205-5370

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

Insufficient information or incorrect forms will result in delays in processing your instructions.