



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
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Request for Transfer of Non-Retirement Account Assets

Complete this form to request a transfer of assets for a **non-retirement** account. Please contact your current fund company to determine if any additional documentation is needed to facilitate the request. For help filling out this form please call 1(800) 372-7827 between 8AM and 6PM ET M-F.

1. Personal Information

Account Owner's Name		Joint Account Owner's Name	
Street Address ()	City	State	Zip Code
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 and have attached the required application.

Deposit the proceeds into my existing account # _____

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

- | | | | |
|---|----------|------------|--|
| Pax Large Cap Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3050) |
| Pax Mid Cap Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3043) |
| Pax Small Cap Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3048);
<input type="checkbox"/> Class A (3098) |
| Pax ESG Beta® Quality Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3042);
<input type="checkbox"/> Class A (3092) |
| Pax ESG Beta® Dividend Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3041) |
| Pax MSCI EAFE ESG Leaders Index Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3047) |
| Pax Global Environmental Markets Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3049);
<input type="checkbox"/> Class A (3099) |
| Pax Ellevest Global Women's Leadership Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3046) |
| Pax Global Opportunities Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3051) |
| Pax High Yield Bond Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3044);
<input type="checkbox"/> Class A (3094) |
| Pax Core Bond Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3045) |
| Pax Balanced Fund | \$ _____ | or _____ % | <input type="checkbox"/> Investor Class (3040) |

3. Please authorize the transfer from your current fund company.

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

Name of Current Fund Company		Account Number	
Mailing Address of Current Fund Company ()	City	State	Zip Code
Contact Telephone of Fund Company			

