



Wespath Investment Management  
1901 Chestnut Avenue  
Glenview, Illinois 60025-1604  
1-847-866-4100  
wespath.org

## Request for Transfer Within an Account Between Investment Funds

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### Part 1 – Account Information

Organization name \_\_\_\_\_  
\_\_\_\_\_

**Please note:** Wespath provides daily investment pricing, and account balances fluctuate accordingly. A transfer request will be honored as long as the account contains a sufficient balance. A transfer request of more than \$2 million may take up to 15 days to process.

Please complete the following information:

Account number \_\_\_\_\_

Transfer from fund\* (please specify) \_\_\_\_\_

Transfer to fund\* (please specify) \_\_\_\_\_

Transfer amount \_\_\_\_\_

*\* This transfer request must specify the account and investment funds to be used.*

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### Part 2 – Signature

Print name\*\* of signatory \_\_\_\_\_

Title \_\_\_\_\_

Signature on behalf of account holder \_\_\_\_\_

Date \_\_\_\_\_

*\*\* Name must appear on the Signature Authorization Card.*

► Make transfers online at **wespath.org**, scan and email this form to **support@wespath.org**, fax this form to **1-847-866-4894** or mail it to the following address:

**Attention:  
Plan Sponsor Management Team  
Wespath Benefits and Investments  
1901 Chestnut Avenue  
Glenview, IL 60025-1604**