

Request for Transfer Within an Account Between Investment Funds

Part 1 – Account Information

Organization name _____

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.*

Please note: Wespath provides daily investment pricing, and account balances fluctuate accordingly. A transfer request will be honored if the account contains a sufficient balance. If your transfers, rebalances or withdrawals, including recurring transactions, total more than \$2 million for any one day, these transactions may be placed on hold for processing for up to 15 business days regardless of the amount or transaction type.

Wespath will notify the investor of the transaction processing date, on which, the transaction will be processed using the fund unit price calculated on the processing date. Transactions will be reflected in your account one day following the processing date.

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.com**, or 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 Institutional Investments
1901 Chestnut Avenue
Glenview, IL 60025-1604

