Wespath

1901 Chestnut Avenue
Glenview, Illinois 60025-1604
wespath.org

Request for Transfer Within an Account Between Investment Funds- Institutional Investments

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.*

Note: While most Wespath funds offer daily investment pricing and liquidity (the "Daily Liquidity Funds"), some may limit when and how frequently investors can make withdrawals, transfers and other transactions (the "Limited Liquidity Funds").

Transfers from Daily Liquidity Funds
Transactions involving daily liquidity funds **must be submitted on business days before 3:00 PM CT** to process the same day. Transactions will be reflected in your account one day following the processing date.

Transfers from Limited Liquidity Funds
Transactions involving limited liquidity funds **must be submitted on business days before 3:00 PM CT** on the fund's redemption request cutoff date to process on the requested processing date. Transactions will be reflected in your account one day following the processing date.

Additional Details
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.

For questions and assistance, please contact your account representative or call Wespath's Institutional Investment Services team at **1-847-866-4100**.

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**, 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