



INDIVIDUAL RETIREMENT ACCOUNT (IRA) TRANSFER REQUEST FORM

Use this form to authorize the transfer of assets from your existing IRA to a Green Century IRA. You may also use this form to authorize the transfer of assets from your existing employer-sponsored retirement plan to a Green Century IRA. If you have questions on how to complete this form, please call 1-800-221-5519, Monday through Friday, 8:00 a.m. to 6:00 p.m. (Eastern Time).

YOUR NAME AND ADDRESS

name			date of birth	
address			social security number	
city	state	zip		
daytime telephone	evening telephone	e-mail address		

ABOUT THE ACCOUNT TO BE TRANSFERRED FROM

name of current IRA trustee or custodian or name of current employer-sponsored retirement plan		
address		
city	state	zip
account number(s) with current trustee/custodian		
Please attach a copy of a recent account statement from this account.		

Current Account Type:

☐ Traditional IRA ☐ Roth IRA ☐ SEP IRA ☐ SIMPLE IRA ☐ Employer-Sponsored Retirement Plan

TRANSFER INSTRUCTIONS

Amount to be transferred:

- ☐ Liquidate and transfer all assets from the above account.
- ☐ Liquidate and transfer \$ _____ or _____ % from the above account.

Date when transfer should be effective:

- ☐ Transfer should be effective immediately.
- ☐ Transfer should be effective as of the maturity date of _____

Please complete and sign next page

IRA TRANSFER REQUEST FORM

INVESTMENT SELECTION

Minimum initial investment is \$1,000 per Fund for the Individual Investor Share Class and \$250,000 per Fund for the Institutional Share Class. The proceeds to be transferred should be invested in the following Fund(s):

	PERCENTAGE OF TRANSFERRED ASSETS	IF EXISTING ACCOUNT, PLEASE WRITE THE ACCOUNT NUMBER	IF NEW ACCOUNT, PLEASE CHECK
Green Century Balanced Fund – Individual Investor Share Class	_____ %	_____	☐
Green Century Balanced Fund – Institutional Share Class	_____ %	_____	☐
Green Century Equity Fund – Individual Investor Share Class	_____ %	_____	☐
Green Century Equity Fund – Institutional Share Class	_____ %	_____	☐
Green Century International Index Fund – Individual Investor Share Class	_____ %	_____	☐
Green Century International Index Fund – Institutional Share Class	_____ %	_____	☐

Type of Green Century Funds IRA to which funds will be transferred:

☐ Traditional IRA ☐ Roth IRA ☐ SEP IRA ☐ SIMPLE IRA

TAX WITHHOLDING INFORMATION

(Complete only if you are converting from a Traditional, SEP or SIMPLE IRA, or an employer-sponsored retirement plan to a Roth IRA.) **The IRS now requires the attached Form W-4R to be completed and submitted along with this form.**

IRS regulations require the Custodian of the IRA from which you are converting to withhold federal income taxes at the rate of 10% from the converted amount, unless you select one of the following:

☐ Do not withhold taxes from my distribution. ☐ Withhold _____ % (greater than 10%) or \$ _____ from my distribution.

Terms: I understand that amounts held from a distribution may be subject to a 10% early withdrawal penalty in addition to income tax. I also understand that a conversion from a Traditional, SEP or SIMPLE IRA, or an employer-sponsored retirement plan to a Roth IRA will be treated as a distribution and may be considered as ordinary income for tax purposes.

Note: Withholding will apply to the entire amount of the conversion, even if non-deductible contributions to the IRA have been made. If you do not elect to have federal income tax withheld, you are liable for payment of federal income tax on the taxable portion of distributions. You may also be subject to the tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate. You may wish to consult a tax advisor regarding the tax consequences for converting your retirement assets to a Roth IRA as well as the implications of withholding amounts from your distribution for federal tax payment.

INVESTOR'S AUTHORIZATION

I hereby agree to the terms and conditions set forth in this Transfer Request, and acknowledge having established a Green Century IRA through execution of the Green Century IRA Account Registration.

signature of depositor

date

Signature guarantee stamp if required by your current IRA custodian.

The Medallion Signature Guarantee is designed to protect you from fraud by providing a warranty that the signature presented is genuine. You can obtain a signature guarantee from most banks, brokerage firms and savings institutions where you have an account. Be sure to ask for a "New Technology" Medallion Signature Guarantee Stamp.

NOTE: A notary public cannot provide a signature guarantee.

INSTRUCTIONS TO RETIRING IRA CUSTODIAN

The IRA transfer check should be made payable to: Green Century Funds FBO [shareholder name]. Please also reference the Green Century Funds account number on the check.

ACCEPTANCE BY CUSTODIAN

To be completed by TMI Trust Company

The above IRA Transfer is accepted by TMI Trust Company as Custodian.

authorized signature
TMI Trust Company

date

Please mail this form to: **GREEN CENTURY FUNDS**
P.O. Box 588
Portland, ME 04112

Overnight express mail to: **GREEN CENTURY FUNDS**
c/o Apex Fund Services
Three Canal Plaza, Ground Floor
Portland, ME 04101

General Instructions (*continued*)

Nonperiodic payments—10% withholding. Your payer must withhold at a default 10% rate from the taxable amount of nonperiodic payments **unless** you enter a different rate on line 2. Distributions from an IRA that are payable on demand are treated as nonperiodic payments. Note that the default rate of withholding may not be appropriate for your tax situation. You may choose to have no federal income tax withheld by entering “-0-” on line 2. See the specific instructions below for more information. Generally, you are not permitted to elect to have federal income tax withheld at a rate of less than 10% (including “-0-”) on any payments to be delivered outside the United States and its territories.

Note: If you don’t give Form W-4R to your payer, you don’t provide an SSN, or the IRS notifies the payer that you gave an incorrect SSN, then the payer must withhold 10% of the payment for federal income tax and can’t honor requests to have a lower (or no) amount withheld. Generally, for payments that began before 2024, your current withholding election (or your default rate) remains in effect unless you submit a Form W-4R.

Eligible rollover distributions—20% withholding. Distributions you receive from qualified retirement plans (for example, 401(k) plans and section 457(b) plans maintained by a governmental employer) or tax-sheltered annuities that are eligible to be rolled over to an IRA or qualified plan are subject to a 20% default rate of withholding on the taxable amount of the distribution. You can’t choose withholding at a rate of less than 20% (including “-0-”). Note that the default rate of withholding may be too low for your tax situation. You may choose to enter a rate higher than 20% on line 2. Don’t give Form W-4R to your payer unless you want more than 20% withheld.

Note that the following payments are **not** eligible rollover distributions for purposes of these withholding rules:

- Qualifying “hardship” distributions;
- Distributions required by federal law, such as required minimum distributions;
- Generally, distributions from a pension-linked emergency savings account;
- Eligible distributions to a domestic abuse victim;
- Qualified disaster recovery distributions;
- Qualified birth or adoption distributions; and
- Emergency personal expense distributions.

See Pub. 505 for details. See also *Nonperiodic payments—10% withholding* above.

Payments to nonresident aliens and foreign estates. Do not use Form W-4R. See Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities, and Pub. 519, U.S. Tax Guide for Aliens, for more information.

Tax relief for victims of terrorist attacks. If your disability payments for injuries incurred as a direct result of a terrorist attack are not taxable, enter “-0-” on line 2. See Pub. 3920, Tax Relief for Victims of Terrorist Attacks, for more details.

Specific Instructions

Line 1b

For an estate, enter the estate’s employer identification number (EIN) in the area reserved for “Social security number.”

Line 2

More withholding. If you want more than the default rate withheld from your payment, you may enter a higher rate on line 2.

Less withholding (nonperiodic payments only). If permitted, you may enter a lower rate on line 2 (including “-0-”) if you want less than the 10% default rate withheld from your payment. If you have already paid, or plan to pay, your tax on this payment through other withholding or estimated tax payments, you may want to enter “-0-”.

Suggestion for determining withholding. Consider using the Marginal Rate Tables on page 1 to help you select the appropriate withholding rate for this payment or distribution. The tables are most accurate if the appropriate amount of tax on all other sources of income, deductions, and credits has been paid through other withholding or estimated tax payments. If the appropriate amount of tax on those sources of income has not been paid through other withholding or estimated tax payments, you can pay that tax through withholding on this payment by entering a rate that is greater than the rate in the Marginal Rate Tables.

The marginal tax rate is the rate of tax on each additional dollar of income you receive above a particular amount of income. You can use the table for your filing status as a guide to find a rate of withholding for amounts above the total income level in the table.

To determine the appropriate rate of withholding from the table, do the following. Step 1: Find the rate that corresponds with your total income not including the payment. Step 2: Add your total income and the taxable amount of the payment and find the corresponding rate.

If these two rates are the same, enter that rate on line 2. (See *Example 1* below.)

If the two rates differ, multiply (a) the amount in the lower rate bracket by the rate for that bracket, and (b) the amount in the higher rate bracket by the rate for that bracket. Add these two numbers; this is the expected tax for this payment. To get the rate to have withheld, divide this amount by the taxable amount of the payment. Round up to the next whole number and enter that rate on line 2. (See *Example 2* below.)

If you prefer a simpler approach (but one that may lead to overwithholding), find the rate that corresponds to your total income including the payment and enter that rate on line 2.

Examples. Assume the following facts for *Examples 1* and *2*. Your filing status is single. You expect the taxable amount of your payment to be \$20,000. Appropriate amounts have been withheld for all other sources of income and any deductions or credits.

Example 1. You expect your total income to be \$62,000 without the payment. Step 1: Because your total income without the payment, \$62,000, is greater than \$61,750 but less than \$115,125, the corresponding rate is 22%. Step 2: Because your total income with the payment, \$82,000, is greater than \$61,750 but less than \$115,125, the corresponding rate is 22%. Because these two rates are the same, enter “22” on line 2.

Example 2. You expect your total income to be \$43,700 without the payment. Step 1: Because your total income without the payment, \$43,700, is greater than \$26,200 but less than \$61,750, the corresponding rate is 12%. Step 2: Because your total income with the payment, \$63,700, is

greater than \$61,750 but less than \$115,125, the corresponding rate is 22%. The two rates differ. \$18,050 of the \$20,000 payment is in the lower bracket (\$61,750 less your total income of \$43,700 without the payment), and \$1,950 is in the higher bracket (\$20,000 less the \$18,050 that is in the lower bracket). Multiply \$18,050 by 12% to get \$2,166. Multiply \$1,950 by 22% to get \$429. The sum of these two amounts is \$2,595. This is the estimated tax on your payment. This amount corresponds to 13% of the \$20,000 payment (\$2,595 divided by \$20,000). Enter "13" on line 2.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to provide this information only if you want to (a) request additional federal income tax withholding from your nonperiodic payment(s) or eligible rollover distribution(s); (b) choose not to have federal income tax withheld from your nonperiodic payment(s), when permitted; or (c) change a previous Form W-4R (or a previous Form W-4P that you completed with respect to your nonperiodic payments or eligible rollover distributions). To do any of the aforementioned, you are required by sections 3405(e) and 6109 and their regulations to provide the information requested on this form. Failure to provide this information may result in inaccurate withholding on your payment(s).

Failure to provide a properly completed form will result in your payment(s) being subject to the default rate; providing fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.