



**Please mail to:**  
Green Century Funds  
P.O. Box 588  
Portland, ME 04112

**Overnight Address:**  
Green Century Funds  
c/o Atlantic Fund Services  
190 Middle Street, Suite 101  
Portland, ME 04101

## Coverdell Education Savings Account Transfer Request Form

Use this form to authorize the transfer of assets from your existing Education Savings Account to a Green Century Education Savings Account. For assistance in filling out this form, please contact Shareholder Services at 1-800-221-5519 Monday through Friday, 8:00 am to 6:00 pm Eastern Time.

### 1. Account Information

#### Designated Beneficiary

*Child for whom the account is established.*

First Name	MI	Last Name	Date of Birth	Social Security Number	
Street Address			City	State	Zip Code
Daytime Telephone		Evening Telephone			

#### Responsible Individual

*Individual named by the Depositor who is authorized to act on behalf of the designated beneficiary. Usually a parent or guardian.*

First Name	MI	Last Name	Date of Birth	Social Security Number	
Street Address			City	State	Zip Code
Mailing Address for Account if Different from Above			City	State	Zip Code
Daytime Telephone		Evening Telephone		Email Address	

#### RELATIONSHIP TO DESIGNATED BENEFICIARY:

☐ Mother ☐ Father ☐ Guardian (*Please provide proof of Guardianship*)

#### Trustee/Custodian

Name of Current Education Savings Account Trustee or Custodian					
Street Address			City	State	Zip Code
Education Savings Account Number(s) with Current Trustee/Custodian					

## 2. Transfer Instructions and Investment Selection

### Transfer Instructions

Amount to be transferred:

- ☐ Liquidate and transfer all assets from the above account  
☐ Liquidate and transfer \$ \_\_\_\_\_ 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 \_\_\_\_/\_\_\_\_/\_\_\_\_

**INSTRUCTIONS TO RETIRING ESA CUSTODIAN:** The 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.

### Investment Selection

The minimum initial investment per Fund is \$1,000. The proceeds to be transferred should be invested in the following Fund(s):

Fund Name	Percentage of Transferred Assets	If Existing Account, Write Account Number	Check if New Account*
Green Century Balanced Fund – Individual Investor Share Class	_____ %	_____	<input type="checkbox"/>
Green Century Equity Fund – Individual Investor Share Class	_____ %	_____	<input type="checkbox"/>
Green Century International Index Fund – Individual Investor Share Class	_____ %	_____	<input type="checkbox"/>

\*For new accounts, also enclose a completed Green Century Coverdell Education Savings Account Registration Form.

## 3. Signatures and Certification of Responsible Individual

The undersigned certifies to the transferring Education Savings Account custodian or trustee that an Education Savings Account Custodial Account which meets the requirements of Internal Revenue Code Section 530 has been established to which assets will be transferred, and certifies to TMI Trust Company that the Education Savings Account from which assets are being transferred meets the requirements of Internal Revenue Code Section 530. The undersigned further certifies that the Designated Beneficiary of the new Education Savings Account is the same person as, or is a family member (as defined in Code Section 529(e)(2)) of, the Designated Beneficiary of the transferring Education Savings Account.

\_\_\_\_\_  
Responsible Individual's Signature

\_\_\_\_\_  
Date

**Medallion Signature Guarantee** (if required by your current Education Savings Account Trustee/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.

<p style="text-align: center;"><b>Medallion Signature Guarantee</b> (if required by your current Education Savings Account Trustee/Custodian)</p>
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## 4. Acceptance by Custodian (To be completed by VT Coverdell Education Savings Account Trustee/Custodian)

The above Coverdell Education Savings Account Transfer is accepted by TMI Trust Company

\_\_\_\_\_  
Authorized Signature – TMI Trust Company

\_\_\_\_\_  
Date