

# Account Transfer Form (Non-IRA)

## 1. INSTRUCTIONS

This form is used to transfer an existing account to your Green Century Account.

- If a new account is being opened, complete this Account Transfer Form and an Account Application.
- Include a statement from your existing account with this form.
- If you are transferring a passbook/certificate type account or an insurance type account, you must submit the passbook, certificate or insurance policy with this form.
- **The current financial institution holding your account may require a "Signature Guarantee" or have other requirements. Please determine the requirements of your current financial institution to avoid delays in processing your transfer.**
- Mail this completed form (along with your Account Application, if opening a new account) to:

**Green Century  
P.O. Box 588  
Portland, ME 04112**

**or Overnight Delivery to:**

**Green Century  
c/o Apex Fund Services  
190 Middle Street, Suite 101  
Portland, ME 04101**

**Contact us toll-free at: 1-800-221-5519**

## 2. YOUR GREEN CENTURY ACCOUNT

Your Name \_\_\_\_\_ Your Account Number (unless new account) \_\_\_\_\_ Social Security Number \_\_\_\_\_

Your Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ E-mail \_\_\_\_\_

Birth Date \_\_\_\_\_ Telephone (day) \_\_\_\_\_ Telephone (evening) \_\_\_\_\_

Please select the fund(s) you wish the transfer proceeds to invest in:

- ☐ Green Century Balanced Fund \_\_\_\_\_ %
- ☐ Green Century Equity Fund \_\_\_\_\_ %
- ☐ Green Century International Index Fund – Individual Investor Shares \_\_\_\_\_ %
- ☐ Green Century International Index Fund – Institutional Investor Shares \_\_\_\_\_ %

## 3. ACCOUNT BEING TRANSFERRED

Name of the Institution Currently Holding Your Account (Shareholder Servicing Agent/Transfer Agent if mutual fund) \_\_\_\_\_

Your Custodian's Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Customer Service Telephone Number \_\_\_\_\_

Account Number \_\_\_\_\_ Account Executive (if any) \_\_\_\_\_

## 4. TRANSFER INSTRUCTIONS

### ☐ Mutual Fund Company Transfer

Name of Fund \_\_\_\_\_

Select One: ☐ Transfer In-Kind

☐ Liquidate \$ \_\_\_\_\_

Name of Fund \_\_\_\_\_

Select One: ☐ Transfer In-Kind

☐ Liquidate \$ \_\_\_\_\_

Name of Fund \_\_\_\_\_

Select One: ☐ Transfer In-Kind

☐ Liquidate \$ \_\_\_\_\_

Name of Fund \_\_\_\_\_

Select One: ☐ Transfer In-Kind

☐ Liquidate \$ \_\_\_\_\_

Name of Fund \_\_\_\_\_

Select One: ☐ Transfer In-Kind

☐ Liquidate \$ \_\_\_\_\_

Name of Fund \_\_\_\_\_

Select One: ☐ Transfer In-Kind

☐ Liquidate \$ \_\_\_\_\_

☐ **Securities Transfer**

Security Name \_\_\_\_\_

Select One: ☐ Liquidate All Shares

☐ Liquidate \$ \_\_\_\_\_

Security Name \_\_\_\_\_

Select One: ☐ Liquidate All Shares

☐ Liquidate \$ \_\_\_\_\_

☐ **Certificate of Deposit Transfer**

☐ Transfer the proceeds of my CD, which matures on \_\_\_\_\_, upon maturity  
Date (MM/DD/YYYY)

☐ Transfer the proceeds of my CD immediately

Note: If you are transferring a CD, and you wish to transfer your CD at maturity, please check the "Upon Maturity" box above and send this form at least two weeks prior to maturity. There may be a premature withdrawal penalty if you choose to liquidate a CD prior to maturity.

## 5. SIGNATURE AND AUTHORIZATION

I hereby agree to the terms and conditions set forth in this Account Transfer Form and acknowledge establishing an account in the Green Century Funds through my execution of a Green Century Funds Account Application.

**Please Note:** The current firm holding your current account may require a *Medallion Signature Guarantee* prior to releasing your assets. To avoid processing delays, please check with your current financial institution to determine if a *Medallion Signature Guarantee* is required.

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Account Holder Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature Guarantee (if required by your current firm)

\_\_\_\_\_  
Signature Guarantee (if required by your current firm)

☐ **Fed Wire Asset Transfer:** By checking this box, I authorize my account asset transfer(s) to be transferred via Fed Wire. I understand that my resigning financial institution may charge a wire fee for this service.

**DO NOT COMPLETE THE SECTION BELOW**

## INSTRUCTIONS TO RESIGNING FINANCIAL INSTITUTION

Please forward a check made payable to the **Green Century Funds, FBO** \_\_\_\_\_

Please include the following reference number on the check \_\_\_\_\_

Please forward the check or draft and any accompanying documents to:

**Regular Mail**

Green Century Funds  
P.O. Box 588  
Portland, ME 04112

**Overnight Delivery**

Green Century Funds  
c/o Apex Fund Services  
Three Canal Plaza, Ground Floor  
Portland, ME 04101

**Wire Delivery**

UMB Bank  
Kansas City, MO  
Atlantic Shareholder Services, LLC FBO  
Green Century Funds  
ABA 101000695  
Account # 9872232100  
Green Century Funds  
(Fund Account Number)

Contact us toll-free at: 1-800-221-5519