APPLIED FINANCE
ADVISORS

# TRADITIONAL/SEP IRA TRANSFER FORM

***Please select a Fund(s), complete this information and return to the Applied Finance Funds with a completed fund application.***

☐ Applied Finance Dividend Fund ☐ Applied Finance Explorer Fund ☐ Applied Finance Select Fund

**IRA TRANSFER LETTER: Transfer Request can be sent regular Mail or Over Night service to:**

**The Applied Finance Funds**
c/o Commonwealth Fund Services, Inc.
8730 Stony Point Parkway, Suite 205
Richmond, VA 23235
(800) 673-0550

**If you are already a shareholder in one of the Applied Finance Funds you do not need to complete another new account application.**

Existing Applied Finance Fund Account Number (if applicable): _____

Date: _____
Month/Date/Year

To: _____
Present Custodian/Trustee/Insurance Company

Address of Present Custodian/Trustee/Insurance Company:

_____
Street City State Zip

Account Number: _____

Social Security or Tax ID Number _____

**Gentlemen/Ladies: I have executed the Individual Retirement Account Application with the Applied Finance Funds.**
By this letter I am requesting that you:

☐ Liquidate the assets in the IRA plan which I have with you and remit the entire proceeds to the Applied Finance Fund applied for in cash, to be invested in my IRA plan with the Applied Finance Funds.

☐ Liquidate $ _____from the IRA plan which I have with you and remit that amount to the Applied Finance Fund applied for in cash, to be invested in my IRA plan with Applied Finance Funds.

☐ Transfer in kind

Affix signature guarantee here:

_____
Account Owner (Please Print)

_____
Signed Date

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**THIS SECTION TO BE COMPLETED BY COMMONWEALTH FUND SERVICES, INC**

Acceptance Agreement by UMB Bank, N.A. The custodian of the Individual Retirement Account is UMB Bank, N.A. It has delegated to Commonwealth Fund Services, Inc. certain ministerial duties, including the execution of the plans and the acceptance of contributions. Pursuant to that delegation of authority, Commonwealth Fund Services, Inc. has, on behalf of the custodian, executed the IRA plan of the individual described above and accepts the appointment of the custodian under the Custodian Account Agreement of the World Funds Trust.

Please make the transfer by check payable to:

**The Applied Finance Funds** FBO: _____

Account Number: _____ By:_____

The Applied Finance Funds are a series of the World Funds Trust