

Regular mail: Impax Funds P.O. Box 534463 Pittsburgh, PA 15253-4463	Overnight mail: Impax Funds Attention: 534463 500 Ross Street, 154-0520 Pittsburgh, PA 15262 Telephone: 1 (800) 372 7827
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Coverdell Education Savings Account Transfer of Assets

Use this form to request a Coverdell ESA transfer of assets from an existing Coverdell ESA to a Coverdell ESA at Impax Funds. Based on your instructions, BNY Mellon Investment Servicing Trust Company will initiate the transfer for you. Incomplete information will result in delays in processing your request.

Fields noted with an asterisk (*) are required.

1. Personal Information

Responsible Individual (Parent/Guardian of Designated Beneficiary)

Name*		Social Security/Tax ID No.*	
Mailing Address*		City*	State* Zip Code*
Day Telephone	Evening Telephone	Cell Telephone	
Email Address			

Check here if contact information above is new. The new information will replace the information currently on file.

Designated Beneficiary of Coverdell ESA

Name*	Social Security/Tax ID No.*
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Complete if transferring from an eligible family member's Coverdell ESA

(This option is only available if you are the Responsible Individual listed on the account)

Family Member Name	Social Security/Tax ID No.
Relationship	Birthdate (mm/dd/yyyy)

2. Investment Instructions – Complete A and B

A. I am opening a new Coverdell Education Savings Account (ESA) and have attached the required application.

Deposit the proceeds into my existing Coverdell ESA Account: #

B. Please purchase into the following fund(s):

	Amount to be invested			Investor Class	Class A
	\$	OR	%		
Impax Large Cap Fund	\$	OR	%	<input type="checkbox"/> 3050	
Impax Small Cap Fund	\$	OR	%	<input type="checkbox"/> 3048	<input type="checkbox"/> 3098
Impax U.S. Sustainable Economy Fund	\$	OR	%	<input type="checkbox"/> 3042	<input type="checkbox"/> 3092
Impax Global Sustainable Infrastructure Fund	\$	OR	%	<input type="checkbox"/> 3041	
Impax Global Opportunities Fund	\$	OR	%	<input type="checkbox"/> 3051	
Impax Global Environmental Markets Fund	\$	OR	%	<input type="checkbox"/> 3049	<input type="checkbox"/> 3099
Impax Ellevest Global Women's Leadership Fund	\$	OR	%	<input type="checkbox"/> 3046	
Impax Global Social Leaders Fund	\$	OR	%	<input type="checkbox"/> 3052	
Impax International Sustainable Economy Fund	\$	OR	%	<input type="checkbox"/> 3047	
Impax Core Bond Fund	\$	OR	%	<input type="checkbox"/> 3045	
Impax High Yield Bond Fund	\$	OR	%	<input type="checkbox"/> 3044	<input type="checkbox"/> 3094
Impax Sustainable Allocation Fund	\$	OR	%	<input type="checkbox"/> 3040	

3. Transfer and Authorization Instructions to Current Custodian

Please attach a copy of a recent statement, if possible. Note: The current custodian may require a Medallion Signature Guarantee to process the transfer request. Please see the **Authorization section** for an explanation of the Medallion Signature Guarantee.

Name of Current Custodian or Agent*		Day Telephone	
Address of Current Custodian or Agent*	City*	State*	Zip Code*

1. Investment to transfer

Account Number	Share Class
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Liquidate Entire Account

Partial Dollar Amount \$ or Number of Shares

Transfer In-Kind

For Certificate of Deposits: Immediately¹ At Maturity: Date

¹ **Note:** If you wish to have certificates of deposit transferred immediately and they have not matured, you may incur a redemption penalty. We cannot accept requests to transfer assets from certificates of deposit more than 60 days before their maturity.

2. Investment to transfer	
Account Number	Share Class

Liquidate Entire Account

Partial Dollar Amount \$ or Number of Shares

Transfer In-Kind

For Certificate of Deposits: Immediately¹ At Maturity: Date

¹ **Note:** If you wish to have certificates of deposit transferred immediately and they have not matured, you may incur a redemption penalty. We cannot accept requests to transfer assets from certificates of deposit more than 60 days before their maturity.

4. Authorization and Medallion Signature Guarantee

I authorize the transfer of assets as noted above to an Impax Funds Coverdell ESA Account and authorize the current custodian, Impax Funds, and BNY Mellon Investment Servicing Trust Company to process this request on my behalf. I understand as the Responsible Individual, it is my responsibility to insure the prompt transfer of assets by the current custodian. I have read and understand all information on this form and hereby provide applicable authorization.

Signature of Responsible Individual	Date
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Medallion Signature Guarantee (if required by your current custodian): An eligible guarantor is a domestic bank or trust company, securities broker/dealer, clearing agency or savings association that participates in a medallion program recognized by the Securities Transfer Agents Association. The three recognized medallion programs are the Securities Transfer Agents Medallion Program (known as STAMP), Stock Exchanges Medallion Program (SEMP), and the Medallion Signature Program (MSP). A notarization from a notary public is NOT an acceptable substitute for a signature guarantee.

Medallion Signature Guarantee