



CONTACT INFORMATION

First Class Mail:
Pacific Funds
P.O. Box 9768
Providence, RI 02940-9768

Overnight Delivery:
Pacific Funds
Attn: Work Management
4400 Computer Drive
Westborough, MA 01581

Phone: (800) 722-2333, Option 2
Website: www.PacificFunds.com

Use this form to request a Coverdell ESA transfer of assets from an existing Coverdell ESA to a Coverdell ESA with Pacific 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. If you need assistance completing this form, please contact Shareholder Services at (800)722-2333, Option 2.

1. Account Information

Responsible Individual

Social Security Number

Designated Beneficiary

Social Security Number

Daytime Telephone Number

Complete the information below 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's Name

Relationship to Designated Beneficiary

Social Security Number

Date of Birth

2. Investment Instructions

Complete items A and B. The minimum initial investment of \$1,000 per fund must be met. Note – If proceeds from the transfer / rollover do not meet the minimum of \$1,000 per fund, the transfer/rollover will be rejected.

A. I am opening a new Coverdell ESA and have attached the Coverdell ESA application.

Deposit the proceeds into my existing Coverdell account number: _____

B. Invest as follows:

Fund Name or Number: _____ Dollar: \$ _____ or Percentage: _____ %

Fund Name or Number: _____ Dollar: \$ _____ or Percentage: _____ %

Fund Name or Number: _____ Dollar: \$ _____ or Percentage: _____ %

3. Transfer / Rollover Instructions

Please attach a copy of a recent statement. Note: The current custodian may require a Medallion Signature Guarantee to process the transfer request (please see the Authorization, Certification, and Signature section for more information). Complete items A and B.

A. Current Custodian Information

Name of Current Custodian

Telephone Number

Street Address for Overnight Delivery

City

State

Zip

3. Transfer / Rollover Instructions continued

B. Please attach your most recent statement. Your current custodian may require a Medallion Signature Guarantee to process your transfer or rollover request. Refer to Authorization, Certification, and Signature section for more information.

1. Name of Investment:: _____ Account #: _____

Select One: Liquidate Transfer-in-kind

Select One: All Partial \$ _____ or # of shares _____

For Certificates of Deposit: Immediately* At Maturity Date: _____

2. Name of Investment:: _____ Account #: _____

Select One: Liquidate Transfer-in-kind

Select One: All Partial \$ _____ or # of shares _____

For Certificates of Deposit: Immediately* At Maturity Date: _____

***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 maturity.

4. Authorization, Certification, and Signature

By signing this form, I acknowledge that I have received and read the application and the current Pacific Funds prospectus. I authorize the transfer of assets or direct rollover as noted above to my Pacific Funds Coverdell ESA and authorize my current custodian, Pacific Funds, BNY Mellon Investment Servicing Trust Company to process this request on my behalf. I understand that it is my responsibility to insure the prompt transfer of assets or direct rollover by the current custodian. I have read and understand all information on this form and hereby provide the applicable authorization.

**SIGN
HERE** 

Participant's Signature _____

Date _____

Medallion Signature Guarantee

Medallion Signature Guarantee Stamp and Signature (if required by your current custodian or transfer agent): 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 acceptable substitute for a signature guarantee.

Distributor: **Pacific Select Distributors, Inc.** (member FINRA) a subsidiary of Pacific Life Insurance Company.

Shares of Pacific Funds are offered by the distributor. The distributor is not a bank, and shares of the Fund are not deposits or obligations of, or guaranteed or endorsed by any bank, nor are they federally insured or otherwise supported by the FDIC, the Federal Reserve Board or any other agency.

The distributor has instituted a Client Identification Program in its obligations under the U.S.A. Patriot Act (Act). This important federal regulation is designed to prevent, deter, and, where necessary, prosecute those who seek to manipulate the U.S. financial system. Consistent with the Act, the provisions of the distributor's Client Identification Program serve to reinforce key elements of a broker/dealers responsibility of becoming familiar with its clients. The distributor may therefore ask you to provide identification documents or other information.

Should you ever have a complaint regarding your account, contact us at the following address:

Pacific Select Distributors, Inc.
Attn: Compliance Department
700 Newport Center Drive
Newport Beach, CA 92660
Telephone: 800-800-7681