



### 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 transfer of SIMPLE IRA assets held with another custodian to your Pacific Funds SIMPLE IRA. Based on your instructions, BNY Mellon Investment Servicing Trust Company will initiate the transfer for you. If you are over 70 ½, you are responsible for distributing any required minimum distribution amounts from your current SIMPLE IRA in advance of the transfer. Please remember the transfer of assets can only occur between SIMPLE IRAs. Incomplete information will result in processing delays on your request. If you require assistance completing this form, please contact Shareholder Services at (800) 722-2333, Option 2.

### 1. Account Information

Shareholder Name (as it appears on account statement)

Social Security Number

Daytime Telephone Number

### 2. Investment Instructions

A.  I am opening a new SIMPLE IRA and have attached the required SIMPLE IRA application.

Deposit the proceeds into my existing SIMPLE IRA 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

A. Current Custodian Information

Name of Current Custodian

Telephone Number

Street Address for Overnight Delivery

City

State

Zip

A. 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: \_\_\_\_\_

#### 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 SIMPLE IRA and authorize my current custodian, Pacific Funds, and 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.