

# GUIDESTONE FUNDS INDIVIDUAL RETIREMENT ACCOUNT (IRA) TRANSFER OF ASSETS / DIRECT ROLLOVER FORM

Use this form to request an IRA transfer of assets or a direct rollover (excluding qualified rollover contributions (conversions) to a Roth IRA) from an existing retirement plan account to your IRA at GuideStone Funds. Based on your instructions, BNY Mellon Investment Servicing Trust Company will initiate the transfer or rollover for you. If you reached or passed the age Required Minimum Distributions begin, you are responsible for distributing any required minimum distribution amounts from your current retirement plan account (excluding Roth IRAs) in advance of the transfer or rollover. Incomplete information will result in delays in processing your request. If you need assistance completing this form, please contact a customer solutions specialist at 1-888-473-8637.

**Mail to the following:** **First-Class Mail Address:**  
GuideStone Funds  
PO Box 534446  
Pittsburgh, PA 15253-4446

**Overnight Address:**  
GuideStone Funds  
Attention 534446  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262  
**1-888-GS-FUNDS (1-888-473-8637)**

**Email to:**  
Rollovers@GuideStone.org

## 1. DIRECT ROLLOVER NOTICE

If this contribution is a direct rollover from a qualified plan or 403(b) or 457 plan, I understand that by signing page 2 of this form, I am acknowledging that the direct rollover contribution is an irrevocable election and is no longer eligible for special tax treatment which may be accorded to distributions from a qualified plan or 403(b) or 457 plan.

You should contact your current plan administrator or custodian prior to completing this form to ensure that you have received and completed any in-house forms that they may require. Direct rollovers from a qualified plan to an IRA can only be in the form of cash.

## 2. SHAREHOLDER INFORMATION

Name: \_\_\_\_\_ Daytime phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP code: \_\_\_\_\_

Social Security number: \_\_\_\_\_ Birth date: \_\_\_\_\_

## 3. INVESTMENT INSTRUCTIONS

Complete items A, B, C and D.

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

Deposit the proceeds into my existing IRA. Account number: \_\_\_\_\_

B. Type of account transferring into:  Traditional IRA  Roth IRA

C. Invest as follows:

Fund: \_\_\_\_\_ Amount: \$ \_\_\_\_\_ or Percentage: \_\_\_\_\_%

Fund: \_\_\_\_\_ Amount: \$ \_\_\_\_\_ or Percentage: \_\_\_\_\_%

Fund: \_\_\_\_\_ Amount: \$ \_\_\_\_\_ or Percentage: \_\_\_\_\_%

Total Amount: \$ \_\_\_\_\_ Total (100%): \_\_\_\_\_%

D. Type of request:

Traditional IRA to Traditional IRA

Roth IRA to Roth IRA

Direct rollover from a qualified plan to a Traditional IRA

Direct rollover from a 403(b) or 457 to a Traditional IRA

Direct rollover from a designated Roth contribution account to a Roth IRA

Continued on other side



**4. CURRENT CUSTODIAN AND ACCOUNT INFORMATION**

Type of account you are transferring/rolling over from (check one):

Traditional/Rollover IRA  Roth IRA  403(b)  457 plan  Qualified plan\*\*

SEP IRA that is being transferred into a Traditional IRA

SIMPLE IRA (after the required two-year holding period) that is being transferred into a Traditional IRA

\*\*If you are rolling over a qualified plan, please contact your current plan administrator for distribution/rollover in-house form requirements.

Please attach your most recent statement, if possible. Note: your current custodian may require a medallion signature guarantee to process your transfer or rollover request. Please see the "Shareholder Authorization" section for an explanation of the medallion signature guarantee.

Current custodian: \_\_\_\_\_

Address (required): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP code: \_\_\_\_\_

Contact name: \_\_\_\_\_ Telephone number: \_\_\_\_\_

**A. Investment to transfer:**

Account number: \_\_\_\_\_ Share class: \_\_\_\_\_ CUSIP number: \_\_\_\_\_

Liquidate entire account  Partial dollar amount \$ \_\_\_\_\_ or # of shares \_\_\_\_\_

For Certificates of Deposit\*:  Immediately  At maturity date: \_\_\_\_\_

**B. Investment to transfer:**

Account number: \_\_\_\_\_ Share class: \_\_\_\_\_ CUSIP number: \_\_\_\_\_

Liquidate entire account  Partial dollar amount \$ \_\_\_\_\_ 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 their maturity.

**5. SHAREHOLDER AUTHORIZATION**

I authorize the transfer of assets or direct rollover as noted above to my GuideStone Funds IRA and authorize my current custodian, GuideStone Funds and BNY Mellon Investment Servicing Trust Company, to process this request on my behalf. I understand 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.

GuideStone® does not recommend rollovers or transfers of assets in employer-sponsored retirement plans or Individual Retirement Accounts ("IRAs"), except when done so expressly in writing. By signing below, I hereby acknowledge that, unless I have received a recommendation in writing to the contrary, GuideStone has not acted as a fiduciary and has not provided me with investment advice in connection with this rollover or transfer.

Shareholder 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 an acceptable substitute for a signature guarantee.

