

**DOMINI SOCIAL INVESTMENTS INDIVIDUAL RETIREMENT ACCOUNT (IRA)
ROLLOVER CERTIFICATION FORM**



If you have questions in completing this form, please contact Shareholder Services at 1-800-582-6757, 9 am to 5 pm Eastern Time. Please consult a tax advisor for tax advice and refer to IRS Publication 590 for more information.

PARTICIPANT INFORMATION

Name: _____ Daytime Telephone: (_____) _____

Address: _____

City: _____ State: _____ Zip Code: _____

Social Security Number: _____ Date of Birth: _____

Account Number: _____

TRADITIONAL ROLLOVER

- Traditional IRA Rollover** - This is a distribution of all or part of my account balance from another Traditional IRA that is being rolled over within 60 days of receipt. I understand that 365 days must have passed since I last received a rollover distribution from the distributing Traditional IRA.
- IRA Eligible Rollover Distribution** - This is a non-periodic distribution from my employer’s qualified retirement plan of all or part of my account balance, other than the portion of any distribution which is nontaxable, which is being rolled over within 60 days of receipt. (Your employer’s plan administrator should be able to tell you what portion of your distribution is an “eligible distribution.”) I certify that no portion of this rollover is from any portion of a Designated Roth Contribution Account under my employer’s qualified retirement plan or from any amount required to be distributed under Internal Revenue Code Sections 408(a)(6) and 401(a)(9), commonly known as a required minimum distribution.

ROTH ROLLOVER

- Roth IRA Rollover** - This is a distribution of all or part of my account balance from another Roth IRA which is being rolled over within 60 days of receipt. I understand that 365 days must have passed since I last received a rollover distribution from the distributing Roth IRA.
- Direct Rollover (Conversion) from an Employer’s Plan** - This is a distribution from my employer’s qualified retirement plan paid as a direct rollover (conversion) contribution into a Roth IRA.
- Designated Roth Contribution Account** - This is a direct rollover or a 60- day rollover from my Designated Roth Contribution Account under my employer’s qualified retirement plan. This rollover represents all or a portion of my Designated Roth Contribution Account under the employer’s qualified retirement plan and no other source of money under the employer’s qualified retirement plan is being rolled over to my Roth IRA.
- Military Death Gratuity Payment** - This rollover contribution is less than \$100,000 and is being made within 365 days of receipt.
- Servicemember’s Group Life Insurance (SGLI)** - This rollover contribution is less than \$400,000 and is being made within 365 days of receipt.

PARTICIPANT CERTIFICATION

I certify that the contribution described above is an eligible IRA rollover or conversion contribution. I certify that this contribution is being rolled over within 60 days of receipt or is being rolled directly from my employer’s plan or current custodian and meets the requirements for tax law provisions, as described above. I certify that the rollover is not part of a series of payments over my life expectancy or over a period of 10 years or more. The rollover does not include any required minimum distribution, hardship distribution, corrective distribution, or deemed distribution from the employer’s qualified retirement plan. I understand that this rollover contribution is irrevocable and involves important tax considerations. Specifically, I understand that a rollover contribution from a pre-tax qualified retirement plan will no longer be eligible for the special averaging, capital gains and separate tax treatment that may be available under the employer’s plan. I agree that I am solely responsible for all tax consequences. I also agree that neither the IRA custodian, Domini Social Investments, nor any of their agents or affiliates shall have responsibility for any such tax consequences or any consequences resulting from this amount being ineligible for rollover. Rules regarding rollovers, and their tax implications, are complex. Please refer to IRS Publication 590 or a tax advisor for more information.

I have read this form and understand and agree to be legally bound by the terms of this form. I also understand that the IRA Custodian will rely on my instructions within this form when accepting my rollover contribution.

Participant’s Signature: _____ **Date:** _____

Mail to the following:

First Class Mail:
Domini Funds
P.O. Box 9785
Providence, RI 02940-9785

Overnight Mail:
Domini Funds
4400 Computer Drive
Westborough, MA 01581
1-800-582-6757

**DOMINI SOCIAL INVESTMENTS 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 conversions to a Roth IRA) from an existing retirement plan account to your IRA at Domini Funds. Based on your instructions, BNY Mellon Investment Servicing Trust Company, will initiate the transfer or rollover for you. If you are over age 70½, 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. Please remember that a transfer of assets can only occur between the same types of retirement plans.

Incomplete information will result in delays in processing your request. If you have any questions in completing this form, please contact Shareholder Services at 1-800-582-6757, 9 am to 5 pm Eastern Time. Please consult a tax advisor for tax advice and refer to IRS Publication 590 for more information.

PARTICIPANT INFORMATION

Name: _____ Daytime Telephone: (_____) _____

Address: _____

City: _____ State: _____ Zip Code: _____

Social Security Number: _____ Date of Birth: _____

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 Rollover IRA SEP IRA Roth IRA

- C. Invest as follows: \$1,500 minimum for each new position
- | | |
|--|---------------------------------------|
| Domini Social Equity Fund (473) Investor Share Class _____ | Dollar \$ _____ or Percentage _____ % |
| Domini International Social Equity Fund (430) Investor Share Class _____ | Dollar \$ _____ or Percentage _____ % |
| Domini Social Bond Fund (501) Investor Share Class _____ | Dollar \$ _____ or Percentage _____ % |
| Domini Deposit Account at PNC Bank (675)* _____ | Dollar \$ _____ or Percentage _____ % |

Must equal 100%

*There is generally a \$3.00 monthly service charge for Domini Deposit Account at PNC Bank account positions, subject to modification or waiver at Domini's discretion. This charge will be automatically withdrawn from your account on or about the 15th of each month (or the next applicable business day).

- D. Type of Request:
- IRA Transfer of Assets (like accounts) Direct Rollover from a Qualified Plan to an IRA Direct Rollover from a 403(b) or 457 to an IRA

DIRECT ROLLOVER NOTICE

If this contribution is a direct rollover from a qualified plan, 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, 403(b), or 457 plan. You may want to contact your current plan administrator or custodian to ensure that you have completed any documents they may require. If you are over age 70½, please contact your current custodian regarding the required minimum distribution rules before initiating a direct rollover. Direct rollovers from a qualified plan to an IRA can only be in the form of cash.

CURRENT CUSTODIAN AND ACCOUNT INFORMATION

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

- Traditional/Rollover IRA SEP-IRA Roth IRA 403(b) 457 Plan Qualified Plan*

*If you are rolling over a qualified plan, please contact your current plan administrator for distribution/rollover 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 Participant Authorization section for an explanation of the Medallion Signature Guarantee.

Name of current custodian: _____

Address: _____

City: _____ State: _____ Zip code: _____

Contact name: _____ Telephone number: () _____

1) Investment to transfer: _____

Account number: _____

- Liquidate Entire Account Partial Dollar Amount \$ _____ or # of Shares _____ Transfer In-Kind (applies only to Domini mutual fund holdings)
- For Certificate of Deposits: Immediately* At Maturity Date _____

2) Investment to transfer: _____

Account number: _____

- Liquidate Entire Account Partial Dollar Amount \$ _____ or # of Shares _____ Transfer In-Kind (applies only to Domini mutual fund holdings)
- For Certificate of Deposits: 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.

HOW DID YOU HEAR ABOUT US?

- TV advertisement Print ad in _____ News story in _____
- Facebook Twitter Morningstar Lipper Internet search
- Friend/Relative Conference Financial Advisor/Broker Other _____

PARTICIPANT AUTHORIZATION

I authorize the transfer of assets or direct rollover as noted above to my Domini Funds IRA and authorize my current custodian, Domini 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.

Participant's Signature: _____ Date: _____

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.

Medallion Signature Guarantee

First Class Mail:
Domini Funds
P.O. Box 9785
Providence, RI 02940-9785

Overnight Mail:
Domini Funds
4400 Computer Drive
Westborough, MA 01581
1-800-582-6757