



DOMINI IMPACT INVESTMENTS

ROTH IRA CONVERSION FORM (EXTERNAL)

IMPORTANT CHANGES TO ROTH CONVERSIONS EFFECTIVE JANUARY 1, 2018

The Internal Revenue Service ("IRS") Announces an Important Change - Effective January 1, 2018, a Roth IRA conversion cannot be recharacterized back to a traditional IRA, SEP or SIMPLE IRA. A Roth IRA conversion is considered an irrevocable election which cannot be "reversed" or "corrected". For more information, please visit the IRS web site www.irs.gov using the search term "IRA FAQs – Recharacterization of Roth Rollovers and Conversions".

IMPORTANT CHANGES TO ROTH CONVERSIONS EFFECTIVE JANUARY 1, 2010

Beginning in 2010, there will be no eligibility requirements for converting a traditional, SEP or SIMPLE (after the required two-year holding period) IRA into a Roth IRA under the Tax Increase Prevention and Reconciliation Act of 2006 ("TIPRA"). You should consult your tax advisor or the Internal Revenue Service (IRS) website www.irs.gov regarding special taxation rules that will apply to conversions occurring in 2010.

EMPLOYER-SPONSORED PLAN CONVERSIONS TO ROTH IRA

Beginning in 2010, individuals are permitted to roll over amounts from employer-sponsored plans, such as qualified plans and 403(b) plans, and convert them to a Roth IRA under The Worker, Retiree, and Employer Recovery Act of 2008 ("WRERA") regardless of their modified adjusted gross income or tax-filing status. Refer to Internal Revenue Service (IRS) Publication 590 for more information. You must contact your employer's plan administrator to initiate the direct rollover conversion. Do not use these forms to request the employer plan direct rollover conversion.

DOMINI IMPACT INVESTMENTS ROTH IRA CONVERSION FORM (EXTERNAL)

This form is for converting a Domini Traditional, SEP or SIMPLE IRA (after the required two year holding period) from another custodian or trustee to a Domini Roth IRA. If establishing a new Domini Roth IRA, attach a completed Roth IRA Application. Do not use this form to recharacterize a prior conversion or IRA contribution. Please consult a professional advisor for tax, legal and investment advice.

If you have any questions, please call our Shareholder Information line at 1-800-582-6757, M – F, 9 am to 6 pm Eastern Time.

PARTICIPANT INFORMATION

Name: _____ Daytime Telephone: (_____) _____

Address: _____

City: _____ State: _____ Zip Code: _____

Impact Security Number: _____ Date of Birth: _____

Current Roth IRA Account Number _____ or New Roth IRA Application attached

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INSTRUCTIONS FOR CONVERSION PROCEEDS

Follow the investment instructions as provided on the attached Application (if establishing new Domini Roth IRA), or

Invest the proceeds as follows in my existing Domini Roth IRA: \$1,500 initial minimum for each new position

Domini Impact Equity Fund (473) Investor Share Class _____ Dollar Amount \$ _____ or Percentage _____ %

Domini International Impact Equity Fund (430) Investor Share Class _____ Dollar Amount \$ _____ or Percentage _____ %

Domini Impact Bond Fund (501) Investor Share Class _____ Dollar Amount \$ _____ or Percentage _____ %

Domini Deposit Account at PNC Bank (675)* _____ Dollar Amount \$ _____ or Percentage _____ %
Must equal 100%

*Domini generally will assess 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).

TAX WITHHOLDING

IRS regulations require the custodian or trustee of your IRA to withhold federal income taxes from the conversion distribution at the rate of 10% unless you elect not to have withholding apply. Withholding will apply to the entire amount of the conversion distribution, including the amount of any nondeductible contributions that may have been made to the IRA. You may not convert any portion of required minimum distributions (RMDs). You may still invest the entire amount of the conversion distribution into your Domini Roth IRA by using other assets to replace previous amounts withheld as a prepayment of federal income taxes. Remember, if you use assets of your IRA to pay taxes on the conversion distribution amount (either by liquidating additional shares or by not replacing amounts withheld for federal income tax), the IRA assets used to pay those taxes will be considered a premature distribution (if you are under the age of 59 ½) since they are not being converted into the Roth IRA or rolled over into another IRA and you could also be subject to a 10% early withdrawal penalty.

I elect not to have federal income tax withheld from this conversion distribution; or

I elect to have 10% federal income tax withheld from this conversion distribution; or

I elect to have _____ % federal income tax withheld from this conversion distribution. (must be more than 10%)

INTERNAL USE ONLY – RESIGNING CUSTODIAN INSTRUCTIONS

Issue check payable to: **BNY Mellon Investment Servicing Trust Company** as custodian for Domini Funds Roth IRA.

FBO: _____ Account No: _____

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

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