



Instructions for completing this form are provided below.

**RESPONSIBLE INDIVIDUAL** (The parent or guardian of the Designated Beneficiary)

Name: \_\_\_\_\_

Street Address\*: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Mailing Address (If different from street address): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**DESIGNATED BENEFICIARY** (Must be under age 18, unless a special needs Designated Beneficiary)

Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**COMPLETE IF TRANSFERRING FROM AN ELIGIBLE FAMILY MEMBER'S COVERDELL ESA ACCOUNT** (This option is only available if you are the Responsible Individual listed on the eligible Family Member's Coverdell ESA Account.)

Family Member's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**INVESTMENT INSTRUCTIONS** (Please Complete A. and B.)

A.  I am opening a new account (s) and have attached the required Coverdell ESA Application and Adoption Agreement  
 Deposit the proceeds into an existing Coverdell ESA Account. Account Number: \_\_\_\_\_

B. Invest as Follows:

|  |                                  |                           |
|--|----------------------------------|---------------------------|
| <u>Domini Impact Equity Fund(0473) Investor Share Class</u>                | <u>Dollar Amount \$</u> _____ or | <u>Percentage</u> _____ % |
| <u>Domini Impact International Equity Fund (0430) Investor Share Class</u> | <u>Dollar Amount \$</u> _____ or | <u>Percentage</u> _____ % |
| <u>Domini Impact Bond Fund (0501) Investor Share Class</u>                 | <u>Dollar Amount \$</u> _____ or | <u>Percentage</u> _____ % |
| <u>Domini Deposit Account at PNC Bank*</u>                                 | <u>Dollar Amount \$</u> _____ or | <u>Percentage</u> _____ % |

Must total to 100%

\*Domini Funds will assess a \$3.00 monthly service charge for all amounts invested within the Domini Deposit Account at PNC Bank position, 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 This charge will be automatically withdrawn from your account on or about the 15th of each month (or the next applicable business day).

**INSTRUCTIONS FOR THE RESPONSIBLE INDIVIDUAL (PLEASE READ CAREFULLY):**

Use this form to initiate a Coverdell ESA transfer of assets from an existing Coverdell ESA to a Coverdell ESA at Domini Funds. When completed, please return the signed form, a copy of the current account statement, and, if applicable, the appropriate new account application for the Coverdell ESA to:

**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

**INSTRUCTIONS FOR THE RESPONSIBLE INDIVIDUAL CONTINUED (PLEASE READ CAREFULLY):**

Based on your instructions, BNY Mellon Investment Servicing Trust Company will initiate the transfer for you. Insufficient information or incorrect forms will result in delays in processing your instructions. If you need assistance in completing this form please contact our Shareholder information line at 1-800-582-6757, Monday through Friday, 9am to 6pm, Eastern time. Please consult a professional advisor for tax, legal, and investment advice.

**TRANSFER AND AUTHORIZATION INSTRUCTIONS TO CURRENT CUSTODIAN**

Please attach a copy of a recent statement, if possible. Note: The current custodian may require your signature to be accompanied by a medallion signature guarantee to process the transfer request.

Name of current custodian: \_\_\_\_\_

Address of current custodian: \_\_\_\_\_

City: \_\_\_\_\_

Contact name: \_\_\_\_\_ Telephone number:( \_\_\_\_\_ )

Investment(s) to be transferred:

1)Account Number and Investment Name: \_\_\_\_\_

Liquidate Entire Account Partial Dollar Amount \$ \_\_\_\_\_ or # of Shares \_\_\_\_\_

Transfer in-Kind Applies only to Domini mutual fund holdings

For Certificate of Deposit redeem: Immediately\* At Maturity Date \_\_\_\_\_ (Not more than 60 days prior to maturity)

2)Account Number and Investment Name: \_\_\_\_\_

Liquidate Entire Account Partial Dollar Amount \$ \_\_\_\_\_ or # of Shares \_\_\_\_\_

Transfer in-Kind Applies only to Domini mutual fund holdings

For Certificate of Deposit redeem: Immediately\* At Maturity Date \_\_\_\_\_ (Not more than 60 days prior to maturity)

\*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 convert certificates of deposit more than 60 days before their maturity.

**How did you hear about us?**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Twitter              | <input type="checkbox"/> Friend/Relative          | <input type="checkbox"/> Internet search: _____ |
| <input type="checkbox"/> Facebook             | <input type="checkbox"/> Lipper                   | <input type="checkbox"/> Conference             |
| <input type="checkbox"/> Morningstar          | <input type="checkbox"/> Financial Advisor/Broker | <input type="checkbox"/> Print ad in: _____     |
| <input type="checkbox"/> News story in: _____ |   | <input type="checkbox"/> Other: _____           |

**AUTHORIZATION**

I authorize the transfer of assets as noted above to a Domini Funds Coverdell ESA Account and authorize the current custodian, Domini Funds, and BNY Mellon Investment Servicing Trust Company to process this request on my behalf. I understand as the Responsible Individual, it is my responsibility to insure the prompt transfer of assets by the current custodian. I have read and understand all information on this form and hereby provide applicable authorization.

Signature of Responsible Individual:

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.