



**Domini.**  
**SIMPLE IRA**  
**APPLICATION INSTRUCTIONS**

**DO NOT USE THIS FORM TO ESTABLISH A COVERDELL ESA, ROTH IRA, SEP IRA, OR TRADITIONAL IRA.  
HOW TO COMPLETE THE ENCLOSED FORMS**

**Please make sure a copy of your employer's SIMPLE IRA plan document (either a 5304-SIMPLE agreement or IRS approved prototype agreement) is attached to your Application. To open a SIMPLE IRA your employer's SIMPLE plan must permit plan participants to designate the financial institution that will serve as the custodian, trustee, or issuer of your SIMPLE IRA. If you are an employer who is establishing a SIMPLE Plan, please refer to the IRS website [www.irs.gov](http://www.irs.gov) to obtain a copy of IRS Form 5304-SIMPLE.**

References to the "Custodian", "BNY Mellon", "we" or "us" mean BNY Mellon Investment Servicing Trust Company.

To establish a SIMPLE Individual Retirement Account ("SIMPLE IRA"), please complete the "SIMPLE IRA Application and Adoption Agreement" (the "Application"). The applicant's name must be that of an individual, not a business or trust. The SIMPLE IRA you establish with the Custodian is referred to in these forms and documents as "your SIMPLE IRA" or "custodial account", depending on the context. The Custodian of the SIMPLE IRA you establish pursuant to the Application must receive the complete name and address of your employer.

For the maximum allowable contribution to your SIMPLE IRA for a tax year, please read the SIMPLE Individual Retirement Account Disclosure Statement carefully and IRS Publications 560 or 590 and consult a professional tax advisor for more information about eligibility requirements and contribution restrictions.

Contributions to your SIMPLE IRA may be invested in one or more mutual funds pursuant to the Mutual Fund Option (please see "Description of Available Options for Your Contributions"). Prospectuses for the mutual funds available through the Mutual Fund Option (the "Funds") may be obtained by calling 1-800-582-6757 or by going to [www.domini.com](http://www.domini.com). Before investing in a Fund, please be sure to read the prospectus for that Fund carefully.

All portions of this SIMPLE IRA Application and Adoption Agreement are binding on you so you are encouraged to read all portions of it, and in particular the section titled "Description of Available Options for Your Contributions", the Custodial Account Agreement and the Application section titled "Terms and Conditions".

The minimum initial investment for each mutual fund or deposit account position within a Domini IRA is \$1,500, and the subsequent minimum is \$100.

**Please make checks payable to Domini Funds.**

**SIMPLE IRA ROLLOVERS**

If you are rolling money into your SIMPLE IRA that you received from another custodian, trustee or issuer, please be sure to mark "Rollover" in the Participant Information section of the Application and complete the Certification of Rollover Assets Form.

**SIMPLE IRA TRANSFERS**

If you will be transferring assets from an existing SIMPLE IRA to your Domini SIMPLE IRA, please be sure to mark "Transfer from a SIMPLE IRA" in the Participant Information section of the Application and complete the SIMPLE IRA Transfer of Assets Form. If you have questions or need assistance, please call 1-800-582-6757.

Please mail your completed Application to:

**First Class Mail:**

Domini Funds  
P.O. Box 9785  
Providence, RI 02940

**Overnight Mail:**

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

**DOMINI IMPACT INVESTMENTS SIMPLE IRA  
APPLICATION and ADOPTION AGREEMENT**



**Investor Share Class Only**

**Domini Impact Investments P.O. Box 9785 Providence, RI 02940 1-800-582-6757**

Please consult a professional advisor for tax, legal and investment advice, and refer to IRS Publications 590-A and –B for more information. If you have any other questions completing this form, please contact our Shareholder Services line at 1 800 582-6757, M - F, 9 a.m. to 6 p.m., Eastern Time.

**PARTICIPANT INFORMATION**

|  |        |                              |
|--|--------|------------------------------|
| Name:  |        | Daytime Telephone: (       ) |
| Street Address *(required) (P.O. Box is not acceptable):   |        | Evening Telephone: (       ) |
| City:  | State: | Zip Code:                    |
| Social Security Number:                                    |        | Date of Birth:               |
| Mailing/PO Box Address (if different from street address): |        |                              |
| City:  | State: | Zip Code:                    |
| Email Address (optional):**                                |        |                              |

\*You must have a valid United States address.

\*\*Domini charges a \$15 annual account service fee for each account with a balance of less than \$10,000, subject to modification or waiver at Domini's discretion. This fee does not apply if you sign up for online account access at [www.domini.com](http://www.domini.com) and choose electronic delivery of account statements, fund reports, and prospectus. To sign up for account access, once your account has been established, please visit [www.domini.com](http://www.domini.com), and click on "Account Access". With e-delivery, you will help to reduce costs, save paper and energy, and cut waste. As the documents become available, you will be notified by email and receive a link to view or download the document, through your online account access. Please notify Domini promptly if your email address changes.

☐ **Transfer from a SIMPLE IRA**      ☐ **Rollover**      ☐ **Establish for Salary Deferrals** - (Important: Fund minimums may apply)

**Date You First Participated in the Employer's Plan:** \_\_\_\_\_

**EMPLOYER INFORMATION**

**Please attach a copy of the employer's 5304-SIMPLE Form or Prototype Adoption Agreement**

|                              |
|------------------------------|
| Employer Name:               |
| Employer Address:            |
| Daytime Telephone: (       ) |

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**INVESTMENT INSTRUCTIONS FOR CONTRIBUTIONS**

Please use a personal check, payable to Domini Funds. Not acceptable are: cashier's checks, money orders, checks payable to third parties, starter checks, traveler's checks or checks drawn on a non-U.S. bank.

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|   |                  |               |   |
|---|------------------|---------------|---|
| Fund Name: Domini Impact Equity Fund (473) Investor Share Class | Dollar Amount \$ | or Percentage | % |
|---|------------------|---------------|---|

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|   |                  |               |   |
|---|------------------|---------------|---|
| Fund Name: Domini Impact International Equity Fund (430) Investor Share Class | Dollar Amount \$ | or Percentage | % |
|---|------------------|---------------|---|

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|   |                  |               |   |
|---|------------------|---------------|---|
| Fund Name: Domini Impact Bond Fund (501) Investor Share Class | Dollar Amount \$ | or Percentage | % |
|---|------------------|---------------|---|

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|   |                  |               |   |
|---|------------------|---------------|---|
| Fund Name: Domini Deposit Account at PNC Bank (675) | Dollar Amount \$ | or Percentage | % |
|---|------------------|---------------|---|

Must equal 100%

All dividends and capital gains, if any, will be reinvested.

Domini generally will assess a \$3 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 withdrawn automatically from your account on or about the 15<sup>th</sup> of each month (or the next applicable business day).

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**BENEFICIARY DESIGNATION**

Note, the share percentage must equal 100% for all Primary or all Contingent Beneficiaries. If neither the Primary nor the Contingent Beneficiary box is checked, the beneficiary will be deemed to be a Primary Beneficiary. If a trust is designated as a Beneficiary, please provide both the date of the trust and the name(s) of the trustee(s).

In the event of my death, the balance in the account shall be paid to the Primary Beneficiaries who survive me in equal shares (or in the specified shares, if indicated). If none of the Primary Beneficiaries survive me, the balance in the account shall be paid to the Contingent Beneficiaries who survive me in equal shares (or in the specified shares, if indicated). I understand that, unless I have specified otherwise, if I name multiple Primary Beneficiaries and a beneficiary does not survive me, such interest is terminated and that percentage will be divided proportionately among the remaining Primary Beneficiaries. Similarly, unless I have specified otherwise, if no Primary Beneficiary survives me and I have named multiple Contingent Beneficiaries and a beneficiary does not survive me, such interest is terminated and that percentage will be divided proportionately among the remaining Contingent Beneficiaries.

I understand that I may change my beneficiaries at any time by giving written notice to the Custodian. If I do not designate a beneficiary, or if all designated beneficiaries predecease me, my surviving spouse will become the beneficiary of my IRA. If I do not have a surviving spouse at the time of my death, my estate will become the beneficiary of my IRA.

**PER STIRPES BENEFICIARY DESIGNATIONS - The Custodian shall accept as complete and accurate all written instructions provided in good order by the estate/executor with regard to the identification of the beneficiaries and the allocations thereto.**

**Participant's Designation:** In the event of my death, I hereby designate the following individuals as the Primary and Contingent Beneficiary(ies) to receive all benefits that may become due and payable under my IRA. If I name a beneficiary that is a Trust, I understand that I must provide certain information concerning the Trust to the Custodian.

☐ Primary ☐ Contingent

|       |                         |
|-------|-------------------------|
| Name: | Social Security Number: |
|-------|-------------------------|

|                |               |        |   |
|----------------|---------------|--------|---|
| Date of Birth: | Relationship: | Share: | % |
|----------------|---------------|--------|---|

|          |                             |
|----------|-----------------------------|
| Address: | Daytime Telephone: (      ) |
|----------|-----------------------------|

|       |        |           |
|-------|--------|-----------|
| City: | State: | Zip Code: |
|-------|--------|-----------|

☐ Primary ☐ Contingent

|       |                         |
|-------|-------------------------|
| Name: | Social Security Number: |
|-------|-------------------------|

|                |               |        |   |
|----------------|---------------|--------|---|
| Date of Birth: | Relationship: | Share: | % |
|----------------|---------------|--------|---|

|          |                             |
|----------|-----------------------------|
| Address: | Daytime Telephone: (      ) |
|----------|-----------------------------|

|       |        |           |
|-------|--------|-----------|
| City: | State: | Zip Code: |
|-------|--------|-----------|

☐ Primary ☐ Contingent

|                      |                     |                                    |         |
|----------------------|---------------------|------------------------------------|---------|
| Name: _____          |                     | Social Security Number: _____      |         |
| Date of Birth: _____ | Relationship: _____ | Share: _____                       | % _____ |
| Address: _____       |                     | Daytime Telephone: (       ) _____ |         |
| City: _____          | State: _____        | Zip Code: _____                    |         |

☐ Primary ☐ Contingent

|                      |                     |                                    |         |
|----------------------|---------------------|------------------------------------|---------|
| Name: _____          |                     | Social Security Number: _____      |         |
| Date of Birth: _____ | Relationship: _____ | Share: _____                       | % _____ |
| Address: _____       |                     | Daytime Telephone: (       ) _____ |         |
| City: _____          | State: _____        | Zip Code: _____                    |         |

#### COMMUNITY PROPERTY SPOUSAL CONSENT

**Note:** Consent of the Participant's spouse may be required in a community property or marital property state to effectively designate a beneficiary other than, or in addition to, the Participant's spouse.

**Disclaimer for Community and Marital Property States:** The Participant's spouse may have a property interest in the account and the right to dispose of the interest by will. Therefore, any sponsors, issuers, depositories and other persons or entities associated with the investments and the Custodian specifically disclaim any warranty as to the effectiveness of the Participant's beneficiary designation or as to the ownership of the account after the death of the Participant's spouse. For additional information, please consult your legal advisor.

I consent to the Beneficiary Designation.

|                            |             |
|----------------------------|-------------|
| Signature of Spouse: _____ | Date: _____ |
|----------------------------|-------------|

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## Telephone Redemption Privileges

You have the ability to make share redemptions, and exchanges to another position within this account, by telephone, unless you inform us otherwise. Certain restrictions apply.

☐ I do not want the ability to redeem IRA shares by telephone on this account.

In this case, you will be able to make redemptions or exchanges only by sending to us a signed letter of instruction.

## **TERMS AND CONDITIONS**

I, the Participant, acknowledge receiving and reading the SIMPLE IRA Application and Adoption Agreement Instructions, the Disclosure Statement, the Custodial Account Agreement, the Privacy Notices and Business Continuity Plan Disclosure Statement (the "Account Documents"). I acknowledge receiving and reading the current prospectus for each Mutual Fund I may have designated for investment. I understand that contributions to my SIMPLE IRA will be invested in accordance with the written instructions I provide with respect to that contribution. The Custodian, upon proper instructions from me, is authorized to exchange units of one Eligible Asset for units of any other Eligible Asset and to purchase units of any Eligible Asset with the proceeds of any redemption.

Article VIII, Section 23 of the Custodial Account Agreement authorizes the Custodian to take or to omit to take certain actions in the event assets or property in my SIMPLE IRA account are liquidated and the Custodian does not receive timely instructions it can reasonably or practicably carry out and I agree to said Section 23.

I hereby establish a SIMPLE IRA in accordance with the instructions provided on these pages and agree to participate under the terms and conditions contained in the Account Documents and these pages titled "SIMPLE IRA APPLICATION AND ADOPTION AGREEMENT" (the "Full Agreement"). I agree that this SIMPLE IRA becomes effective only upon written acceptance by the Custodian and that such written acceptance will consist of a confirmation of transaction statement. I also acknowledge receiving a copy of the employer plan document under which this SIMPLE IRA is established.

I agree that the Custodian may amend (add to, delete from or revise) any term of the Full Agreement at any time by notice to me and that my sole remedy if I disagree with the amendment is to transfer funds in the SIMPLE IRA account to another custodian. I agree that the Full Agreement is binding on me and on my successors in interest.

**Custodial Fees:** \$10.00 annual maintenance fee per account per year. This fee is owed and due for each full and partial calendar year that the SIMPLE IRA is open. The Participant may pay the fee with funds other than those in the SIMPLE IRA ("non-custodial funds"). If the fee for a calendar year is not paid by the participant from non-custodial funds by the date reasonably designated by the Custodian or prior to closing the SIMPLE IRA account, the Custodian is authorized to deduct the fee from funds in the SIMPLE IRA account at any time immediately after such payment due date or immediately after receiving instructions to close the SIMPLE IRA account. The Custodian is authorized to change the fee but will give at least 30 days written notice to the Participant of any fee change. The Custodian will keep those records, identify and file returns and provide other information concerning the IRA as required of custodians by the Internal Revenue Code and any regulations issued or forms adopted by the Internal Revenue Service or U.S. Treasury Department.

I understand that the telephone transaction privileges will apply to my account. If I have telephone transaction privileges, I agree that neither the Custodian, Domini Funds, nor their transfer agent, their agents, officers, trustees, directors or employees will be liable for any loss, liability or expense for acting, or refusing to act on instructions given under the telephone transaction privileges that are reasonably believed to be genuine and I accept the risk of loss.

I direct that upon my death benefits be paid as indicated on the beneficiary designation. If I name a Trust as beneficiary, I understand I must provide certain information concerning such Trust to the Custodian.

I (the Participant) certify under penalties of perjury that (i) all information I have provided on this form or otherwise in connection with establishing my SIMPLE IRA is true, correct, and complete, and (ii) I am a US person (including a US resident alien) and that my Social Security Number is true, correct and complete and that this number is my Taxpayer Identification Number. (Foreign persons must use appropriate Form W-8)

**To help the U.S. Government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies persons opening accounts; To comply, the Custodian requires the participant's name, address, date of birth and government-issued identification number (generally, a Social Security Number) and other information that may help the Custodian identify the participant; and the Custodian may ask for copies of related documentation and may consult third-party databases to help verify the participant's identity. I have read and I understand the Disclosure Statement which explains the risks of opening this account if I do not provide all requested identification materials or if my identity cannot be adequately verified in accordance with U.S. Government requirements.**

Participant's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

SIMPLE IRA Custodian: BNY Mellon Investment Servicing Trust Company, 4400 Computer Drive, Westborough MA 01581

**DEALER OR ADVISOR DESIGNATION** - If you do not have a Dealer or Advisor assisting you with this transaction, please leave this section blank.

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

Firm Number: \_\_\_\_\_

Representative's Name: \_\_\_\_\_

Rep. Number: \_\_\_\_\_

Telephone: (            ) \_\_\_\_\_

Branch Number: \_\_\_\_\_

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

**FACTS****WHAT DOES BNY MELLON INVESTMENT SERVICING TRUST COMPANY DO WITH YOUR PERSONAL INFORMATION?****Why?**

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information.

Please read this notice carefully to understand what we do.

**What?**

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number
- Account balances
- Transaction history
- Account transactions
- Retirement assets

When you are no longer our customer, we continue to share your information as described in this notice.

**How?**

All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons BNY Mellon Investment Servicing Trust Company chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information   | Does <b>BNY Mellon Investment Servicing Trust Company</b> share? | Can you limit this sharing? |
|--|--|-----------------------------|
| For our everyday business purposes—such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes  | No                          |
| For our marketing purposes—to offer our products and services to you   | No   | No                          |
| For joint marketing with other financial companies   | No   | No                          |
| For our affiliates' everyday business purposes— information about your transactions and experiences  | Yes  | No                          |
| For our affiliates' everyday business purposes— information about your creditworthiness  | No   | No                          |
| For our affiliates to market to you  | No   | No                          |
| For nonaffiliates to market to you   | No   | No                          |

**Questions?**

Call 855-649-0623

## Who we are

|                               |   |
|-------------------------------|---|
| Who is providing this notice? | BNY Mellon Investment Servicing Trust Company, custodian for self-directed savings and retirement accounts, such as Individual Retirement Accounts, Qualified Plans and 403(b)(7) Plans, and for mutual fund Wrap Product and Global Cash Portal accounts |
|-------------------------------|---|

## What we do

|  |   |
|--|---|
| How does <b>BNY Mellon Investment Servicing Trust Company</b> protect my personal information? | To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.   |
| How does <b>BNY Mellon Investment Servicing Trust Company</b> collect my personal information? | <p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Open an account or deposit funds</li> <li>• Make deposits or withdrawals from your account</li> <li>• Provide account information</li> <li>• Give us your contact information</li> <li>• Show your government-issued ID</li> </ul> <p>We also collect your personal information from affiliates or other companies.</p> |
| Why can't I limit all sharing?   | <p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>            |

## Definitions

|                 |  |
|-----------------|--|
| Affiliates      | Companies related by common ownership or control. They can be financial and nonfinancial companies.  |
| Nonaffiliates   | <p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• <b>BNY Mellon Investment Servicing Trust Company</b> does not share information with nonaffiliates so they can market to you.</li> </ul> |
| Joint marketing | <p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>• <b>BNY Mellon Investment Servicing Trust Company</b> doesn't jointly market.</li> </ul>                                 |

## Other important information

This notice applies to individual consumers who are customers or former customers. This notice replaces all previous notices of our consumer privacy policy, and may be amended at any time. We will keep you informed of changes or amendments as required by law.

## DOMINI PRIVACY POLICY

Rev. September 11, 2017

### FACTS

#### WHAT DOES **DOMINI** DO WITH YOUR PERSONAL INFORMATION?

|      |  |
|------|--|
| Why? | <p>Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information.</p> <p>Please read this notice carefully to understand what we do.</p> |
|------|--|

|       |   |
|-------|---|
| What? | <p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"><li>• Social Security number</li><li>• Name, address, email address, and phone number</li><li>• Account balances</li><li>• Transaction history</li><li>• Account transactions</li><li>• Assets</li><li>• Retirement assets</li></ul> <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p> |
|-------|---|

|      |  |
|------|--|
| How? | <p>All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Domini chooses to share; and whether you can limit this sharing.</p> |
|------|--|

| Reasons we can share your personal information   | Does <b>Domini</b> share? | Can you limit this sharing? |
|--|---------------------------|-----------------------------|
| <b>For our everyday business purposes—</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | Yes                       | No                          |
| <b>For our marketing purposes—</b> to offer our products and services to you   | Yes                       | No                          |
| <b>For joint marketing with other financial companies</b>  | No                        | We don't share              |
| <b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences   | Yes                       | No                          |
| <b>For our affiliates' everyday business purposes—</b> information about your creditworthiness   | No                        | We don't share              |
| <b>For our affiliates to market to you</b>   | No                        | We don't share              |
| <b>For nonaffiliates to market to you</b>  | No                        | We don't share              |

|            |   |
|------------|---|
| Questions? | Call 1-800-498-1351 or go to <a href="http://www.domini.com">www.domini.com</a> |
|------------|---|

## Who we are

|                               |  |
|-------------------------------|--|
| Who is providing this notice? | Domini Impact Investments LLC (“DSIL”) ; DSIL Investments Services LLC; and all the Funds advised by DSIL (collectively referred to as “Domini”). A complete list of Funds is included under Affiliates below. |
|-------------------------------|--|

## What we do

|   |   |
|---|---|
| How does <b>Domini</b> protect my personal information? | To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. Our internal data security policies restrict access of nonpublic personal information to authorized employees. We maintain physical, electronic and procedural safeguards to guard our customers' nonpublic personal information. Employees who violate our data security policies are subject to disciplinary action, up to and including termination. |
| How does <b>Domini</b> collect my personal information? | <p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>• Open an account or invest funds</li> <li>• Make deposits or withdrawals from your account</li> <li>• Provide account information</li> <li>• Give us your contact information</li> <li>• Show your government-issued ID</li> </ul> <p>We also collect your personal information from affiliates or other companies.</p>  |
| Why can't I limit all sharing?                          | <p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>• Sharing for affiliates' everyday business purposes—information about your creditworthiness</li> <li>• Affiliates from using your information to market to you</li> <li>• Sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing.</p>  |

## Definitions

|                 |   |
|-----------------|---|
| Affiliates      | <p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• Our affiliates include DSIL; DSIL Investment Services LLC; Domini Holdings LLC; and the registered investment companies advised by DSIL including the Domini Investment Trust and its series, the Domini Impact Equity Fund, the Domini Impact International Equity Fund, and the Domini Impact Bond Fund.</li> </ul> |
| Nonaffiliates   | <p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• <b>Domini</b> does not share information with nonaffiliates so they can market to you.</li> </ul>   |
| Joint marketing | <p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>• <b>Domini</b> does not jointly market.</li> </ul>  |

## **Business Continuity Plan Disclosure Statement**

Domini Impact Investments LLC and its affiliated distributor, DSIL Investment Services LLC, maintain a Business Continuity Plan (BCP) that has been developed with the goal of protecting the health and safety of our employees and maintaining continuity of service for our Domini Funds' shareholders. Our plan is designed to ensure that we are prepared to operate through significant business disruptions, so that our shareholders can access their accounts without significant interruption under most circumstances.

Key elements of our BCP include the following:

- Critical data from our computer systems is backed up daily to geographically remote, secure facilities.
- All Domini employees can access Domini's computer data remotely via a secure connection. In the event that Domini's primary network is not accessible, Domini maintains replicas of all files and database servers in a geographically remote disaster-recovery network available to all employees over a secure connection.
- We maintain an office evacuation plan and emergency procedures in the event of a disaster affecting our primary office facilities or surrounding area.
- We maintain an emergency contact list and procedures updated and distributed on a regular basis.

Our mission critical functions, including shareholder transaction processing, custody and fund accounting, and investment submanagement, are accomplished through our key service providers. These key service providers are required to maintain business continuity plans, which Domini reviews at least annually.

Domini's BCP is designed to address significant business disruptions of varying scope, including a firm-only disruption, single-building disruption, city-wide business disruption, or a regional disruption. In the event of a significant business disruption, our employees are to communicate from alternate locations and access Domini's computer data remotely. Key service providers would be contacted, and would, if possible, continue to provide critical shareholder transaction processing, custody, fund accounting, and investment submanagement services. Our key service providers maintain offices outside New York City, thereby lessening the effect of a city-wide business disruption. Our key service providers maintain alternate business locations with the goal of enabling them to resume critical functions in a reasonable period of time in the event of a regional disruption of significant scope.

If you need to contact us after a significant business disruption, please call our Shareholder Information line at 1-800-582-6757, our main office telephone number at 212-217-1100, or go to our website at [www.domini.com](http://www.domini.com) and click on the "Contact Us" link. If you cannot contact us by calling our Shareholder Information line, our main office phone number, or our website, please contact Domini Funds' Transfer Agent, BNY Mellon Asset Servicing, at 610-382-7826 or through its website at <http://www.bnymellon.com/assetservicing/index.html>.

It is impossible for us to anticipate every potential problem that may occur, but we believe our BCP will enable us to continue to conduct business in the event of a variety of possible business disruptions. We believe that our BCP is reasonably designed to help us limit the recovery time necessary to resume operations.

We review and test our BCP at least annually. The BCP is subject to modification based on changing circumstances and assessment of need.