APPLIED FINANCE ADVISORS

TRADITIONAL/SEP IRA TRANSFER FORM

Please select a Fund(s), complete this information and return to the Applied Finance Funds with a completed fund application.

☐ Applied Finance Core Fund ☐ Applied Finance Explorer Fund

☐ Applied Finance Dividend Fund ☐ Applied Finance Select Fund

IRA TRANSFER LETTER: Transfer Request can be sent regular Mail or Over Night service to:

The Applied Finance Funds
c/o Commonwealth Fund Services, Inc.
8730 Stony Point Parkway, Suite 205
Richmond, VA 23235
(800) 673-0550

If you are already a shareholder in one of the Applied Finance Funds you do not need to complete another new account application.

Existing Applied Finance Fund Account Number (if applicable): ____________________

Date: ____
Month/Date/Year

To: ____
Present Custodian/Trustee/Insurance Company

Address of Present Custodian/Trustee/Insurance Company:

____
Street City State Zip

Account Number: ____

Social Security or Tax ID Number ____

Gentlemen/Ladies: I have executed the Individual Retirement Account Application with the Applied Finance Funds.
By this letter I am requesting that you:

☐ Liquidate the assets in the IRA plan which I have with you and remit the entire proceeds to the Applied Finance Fund applied for in cash, to be invested in my IRA plan with the Applied Finance Funds.

☐ Liquidate $ __________from the IRA plan which I have with you and remit that amount to the Applied Finance Fund applied for in cash, to be invested in my IRA plan with Applied Finance Funds.

☐ Transfer in kind

Affix signature guarantee here:

____
Account Owner (Please Print)

____
Signed Date

THIS SECTION TO BE COMPLETED BY COMMONWEALTH FUND SERVICES, INC

Acceptance Agreement by UMB Bank, N.A. The custodian of the Individual Retirement Account is UMB Bank, N.A. It has delegated to Commonwealth Fund Services, Inc. certain ministerial duties, including the execution of the plans and the acceptance of contributions. Pursuant to that delegation of authority, Commonwealth Fund Services, Inc. has, on behalf of the custodian, executed the IRA plan of the individual described above and accepts the appointment of the custodian under the Custodian Account Agreement of the World Funds Trust.

Please make the transfer by check payable to:

The Applied Finance Funds FBO: ____

Account Number: ____________________ By:______________________________

The Applied Finance Funds are a series of the World Funds Trust