

Roth IRA Transfer of Assets Form

GuideStone Funds
P.O. Box 9834
Providence, RI 02940-8034

GuideStone Trust Services, an affiliate of GuideStone Financial Resources
of the Southern Baptist Convention, serves as IRA custodian.
For assistance, please call **1-888-98-GUIDE** (1-888-984-8433).

Use this form to request a transfer of assets from another financial institution to GuideStone Funds. This form may only be used for one transfer request per institution. Separate forms must be completed for any additional transfers. Do not use this form to convert an IRA to a Roth IRA. Attach a copy of a current statement if possible.

1. PARTICIPANT INFORMATION (THE FORM MUST BE COMPLETED IN INK)

Participant first name: _____ MI: _____ Last: _____

Social Security number: _____ Birth date: ____/____/____

Home telephone: (____) _____ Daytime telephone: (____) _____

Mailing address: _____

City: _____ State: _____ ZIP Code: _____

Physical address (if different from above): _____

City: _____ State: _____ ZIP Code: _____

Email address (optional): _____

2. TRANSFER INSTRUCTIONS

Account to be transferred to GuideStone Funds (Transfer of assets can only occur between Roth IRAs):

Current custodian: _____ Telephone number: (____) _____

Address: _____

City: _____ State: _____ ZIP Code: _____

These are funds from a Conversion Roth IRA. Date converted: ____/____/____

These are Roth contribution funds. Tax year of first contribution: _____

Place these funds: In a new Roth IRA (I have attached the Roth IRA Application)

In my existing Roth IRA Account number: _____

Into the following funds (the initial investment must be at least \$1,000 per fund).

Fund: _____ %

Fund: _____ %

Fund: _____ %

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2. TRANSFER INSTRUCTIONS (CONTINUED)

Please liquidate the following investments and transfer proceeds to my GuideStone Funds IRA.

Account number: _____ Fund: _____ Entire account Partial _____ \$ or %

Account number: _____ Fund: _____ Entire account Partial _____ \$ or %

For Certificates of Deposit: Immediately or Upon maturity Maturity date: ____ / ____ / ____

If your CD is to be transferred to GuideStone Funds upon maturity, we must receive this form at least 30 days, but not more than 60 days, prior to the maturity date. If the maturity date is more than 60 days away, the transfer form will be returned to you. Your current IRA custodian may impose a premature withdrawal penalty if you choose to liquidate your CD prior to maturity. If you are transferring more than one CD and the maturity dates are more than one month apart, please complete separate forms.

Instructions to resigning Custodian/Transfer agent:

Please liquidate the participant’s account and mail check payable to:

First Class mail:
GuideStone Funds, FBO participant name
Roth IRA
P.O. Box 9834
Providence, RI 02940-8034

Overnight mail:
GuideStone Funds, FBO participant name
Roth IRA
101 Sabin Street
Pawtucket, RI 02860-1427

3. PARTICIPANT SIGNATURE

I authorize the transfer of assets as noted above to my GuideStone Funds Roth IRA and authorize GuideStone Funds and GuideStone Trust Services to process this request on my behalf. I understand it is my responsibility to assure the prompt transfer of assets by the current custodian.

Participant signature: _____ Date: ____ / ____ / ____

Medallion signature guarantee: Please call the custodian or the other institution from which you are transferring to see if a signature guarantee or other documentation is required.

Medallion signature guarantee — Medallion stamp*: _____

* The medallion signature guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations which participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a signature guarantee. The medallion signature guarantee stamp must include the words “SIGNATURE GUARANTEED, MEDALLION GUARANTEED” and otherwise comply with the medallion program requirements. Please check your fund prospectus or with your fund as to whether a signature guarantee is required.

TO BE COMPLETED BY GUIDESTONE TRUST SERVICES AS CUSTODIAN

GuideStone Trust Services accepts its appointment as custodian of the above referenced Roth IRA and has established an IRA under the Internal Revenue Code section 408(a) for IRAs under the participant’s name in GuideStone Funds. GuideStone Funds and GuideStone Trust Services, as custodian, cannot accept assets other than cash. Upon receipt of check, the proceeds will be credited to the named participant’s account.

Accepted by GuideStone Trust Services as custodian for GuideStone Funds IRAs.

Signature of
GuideStone Trust Services
authorized representative: _____ Date: ____ / ____ / ____

Broker/Dealer: 00005 — GuideStone Financial Services