



Coverdell Education Savings Account (ESA) Transfer Form

Questions?

Call 877-771-EVEN (3836)

*This form can also be obtained
or completed online at
www.eventidefunds.com.*

If this is for a new Coverdell ESA Account, a Coverdell ESA Application must accompany this form.

Please use this form if you intend to transfer assets from an existing Coverdell ESA to an Eventide Funds Coverdell ESA. Please consult your tax advisor for more information about any tax consequences for transferring your Coverdell ESA.

Step 1: Investor Information

Designated Beneficiary / Student:

M.I.

Step 2: Current Custodian / Financial Institution

IMPORTANT: Please enclose a copy of your current account statement.

Step 3: Transfer Instructions

Eventide Funds will forward these instructions to your current custodian to initiate the transfer process.

A Coverdell ESA has been established in my name at Eventide Funds. I direct you to: (choose one)

- Liquidate all of the assets from my account**
- Liquidate a portion of my account** (please specify below)

\$ _____ or _____ %

Send the check representing the assets payable to "Eventide Gilead Fund FBO _____
ESA" along with a copy of this form to: _____
 Designated Beneficiary's / Student's Name

Eventide Funds

c/o Matrix Capital Group, Inc.
 630-A Fitzwatertown Road 2nd Floor
 Willow Grove, PA 19090-1904

IF NO SELECTIONS ARE MADE ABOVE, PLEASE LIQUIDATE ALL ASSETS FROM MY ACCOUNT IMMEDIATELY.

Step 4: Information About Your Eventide Funds Coverdell ESA Account

Please select one.

- Establish a new Eventide Funds Coverdell ESA account** (please complete and enclose Coverdell Education Savings Account (ESA) Application)
- Use my existing Eventide Funds Coverdell ESA account number** _____

Step 5: Investment Selection

Fund Name:	Amount:
Eventide Gilead Fund	\$ _____

Step 6: Signature

I certify that I am the proper party to authorize the transfer of the Coverdell Education Savings Account assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by the Trustee or Custodian. I understand that I am responsible for determining that this ESA transfer qualifies under the rules and conditions applicable to such transfers and agree to abide by those rules and conditions. I further certify that no tax advice has been given to me by the Trustee or Custodian. All decisions regarding this transfer are my own. I expressly assume responsibility from any adverse consequences which may arise from this transfer and I agree that the Trustee or Custodian shall in no way be held responsible.

I authorize Matrix Capital Group, Inc. to act on my behalf in contacting the current custodian or plan administrator to facilitate the transfer of assets.

X

 Signature of Designated Beneficiary / Student or Responsible Party

 Date (mm/dd/yyyy)

Step 6: Signature

Continued

Medallion Signature Guarantee Stamp* (if required by your current financial institution)

* A signature guarantee may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, saving associations, credit unions, and brokerage firms. The words "SIGNATURE GUARANTEED" must be stamped or typed near each of your signatures being guaranteed. The guarantee must appear with the printed name, title, and signature of an officer and the name of the guarantor institution. **Please note that a Notary Public Seal or Stamp is not acceptable.**

- Checklist:**
- ✓ Completed a Coverdell ESA Application if the transfer of direct rollover is going to a new account
 - ✓ Included documents from your current custodian or financial institution
 - ✓ Signed the transfer form in Step 6

Step 7: Acceptance of Transfer

This section is to be completed by Huntington National Bank Agent

The ESA designated by the above-named individual is a valid ESA. The Custodian, as identified in the Education Savings Account Application, hereby agrees to serve as the Custodian for the account of the above-named individual, and in that capacity, agrees to accept the transfer of the assets listed above.

X

Matrix Capital Group, Inc. Agent (for Huntington National Bank)

Date (mm/dd/yyyy)