



IRA 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 IRA Account, an IRA Application must accompany this form.

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

Step 1: Investor Information

Owner:

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.

An IRA 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 _____ %

And to process this request: (choose one)

- Immediately*

* Note: There may be penalties for withdrawing certain investments before their maturity (i.e., certificates of deposit or annuities). Please contact your current custodian or financial institution to determine the applicable penalty, if any.

- At maturity** _____ (mm/dd/yyyy)

** Please send all transfer requests at least three (3) weeks before maturity to allow for proper time limitations.

Send the check representing the assets payable to "Eventide Gilead Fund FBO _____
IRA" along with a copy of this form to: _____
Account Owner'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 IRA Account

Please select one.

- Establish a new Eventide Funds IRA account (please complete and enclose Eventide IRA Application)
- Use my existing Eventide Funds IRA account number _____

Step 5: Investment Selection

Fund Name:	Amount:
Eventide Gilead Fund	\$ _____

Step 6: Age 70 ½ Information

Please select one.

- I am under the age of 70 ½ and do not turn 70 ½ at any time during the calendar year
- I am age 70 ½ or older or will turn 70 ½ during the calendar year and understand that part of my required minimum distribution is eligible for transfer or rollover. I further understand that there may be significant tax penalties if a transfer or rollover of my required distribution occurs.

Step 7: Conversion of Traditional IRA to Roth IRA *Optional*

I am converting assets from a Traditional IRA with the intention of establishing a Roth IRA.

Step 8: Signature

I certify that I have established an IRA with the Eventide Gilead Fund which Huntington National Bank is the Custodian. I agree to contact my present Custodian from whom I am transferring to determine if specific documentation or a signature guarantee is required. I understand that I am responsible for determining my eligibility for all transfers or direct rollovers. I agree to hold the Custodian harmless against any and all situations arising from an ineligible transfer or direct rollover. I acknowledge that the Custodian or its agent cannot provide legal advice and I agree to consult with my own tax professional for advice.

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 Account Owner

Date (mm/dd/yyyy)

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 an Eventide IRA 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 8

Step 9: Acceptance of Transfer *This section is to be completed by Huntington National Bank Agent*

Huntington National Bank hereby accepts its appointment as Custodian of the above IRA account and upon receipt of assets, will deposit such assets in an Eventide Gilead Fund IRA on behalf of the Depositor authorizing this transfer or direct rollover.

X

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

Date (mm/dd/yyyy)