



NEW COVENANT FUNDS  
 Attn: Shareholder Services  
 P.O. Box 701  
 Milwaukee, WI 53201-0701

TRADITIONAL IRA/Roth IRA  
 Rollover Certification Form

Use this form to certify a rollover distribution from your current Traditional IRA or Roth IRA, or eligible distribution which you have physically received from a qualified retirement plan to your New Covenant Funds IRA. You must complete the rollover within 60 calendar days of your receipt of that distribution.

*Please note: 20% withholding is required on any eligible rollover distribution from a qualified retirement plan, unless the distribution is transferred directly to an IRA or other qualified plan. To transfer your distribution directly, please complete the "Transfer of Assets/Direct Rollover Form" included with this Application.*

Name (Please print your name exactly as it appears on your IRA.)			Date of Birth
Street Address (P.O. Box is not sufficient)			Social Security Number
City	State	Zip	Daytime Telephone

Type of Rollover Contribution (Please check one)

- Traditional IRA/Roth Rollover** - Note that 365 days must have passed since you last received a rollover distribution for the distributing IRA.
- Qualified Plan Rollover Distribution** - A non-periodic distribution from a qualified retirement plan of all or part of your account balance, other than the portion of any distribution which is nontaxable, which is being rolled over into your New Covenant Funds IRA within 60 days of receipt. Your employer's benefits or personnel office should be able to tell you what portion of your distribution is an "eligible distribution."
- Qualified Domestic Relations Order Distribution**
- QP Rollover from Roth 401k/403b**

70-1/2 Rollover Restrictions - for Traditional IRA only (Please check one)

- I am not nor will be 70-1/2 or older in this calendar year.
- I am or will be 70-1/2 or older in this calendar year. I understand that I may not rollover any amounts required to be distributed under Internal Revenue Code Sections 408(a)(6) and 401(a)(9).

Certification

I certify that the contribution described above is an eligible Traditional/Roth IRA rollover contribution and that I am rolling over this contribution within 60 calendar days of my receipt of that distribution. I understand that this rollover is irrevocable and involves important tax considerations. Specifically, I understand that a rollover contribution from a qualified retirement plan will no longer be eligible for the special averaging, capital gains and separate tax treatment that may be available for distributions from such plans. Other tax considerations may also apply.

I agree that I am solely responsible for all tax consequences of this rollover contribution. I also agree that neither the IRA custodian nor New Covenant Funds shall have any responsibility for any such tax consequences. I also understand that restrictions regarding subsequent rollovers may apply.

**I have read and understand and agree to be legally bound by the terms of this form. I also understand that the IRA custodian will rely on this form when accepting my rollover contribution. I understand that this rollover is irrevocable and may not be reversed in the future. I also understand that I am responsible for the movement of the rollover to my successor IRA, and that neither U.S. Bank, U.S. Bancorp Fund Services, nor New Covenant Funds have any duty to enforce the collection of any assets to be rolled over to my New Covenant Funds IRA.**

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

Date \_\_\_\_\_