

Instructions: Complete this form only if you would like the EPIC Client Services Group to add or remove Participant to Participant Transfer Instructions. After completion, submit this form through Connect, or fax or mail this form to the fax number or address at the bottom of this page.

Note: This form is only for Participant to Participant Transfers, which are transfers from your EPIC account(s) to another Participant's EPIC account(s) within the same investment option. EPIC encourages you to notify the Receiving Participant(s) regarding the nature of each Participant to Participant Transfer. Your new Participant to Participant Transfer Instructions may take the EPIC Client Services Group up to 24 hours to verify and set up on your account. The instructions and authorized signature below permit the EPIC Client Services Group, per your direction, to establish transfer instructions to move money from your EPIC account(s) to another Participant's EPIC accounts.

PARTICIPANT INFORMATION: (All fields in this section must contain Sending Participant information ONLY.)

Participant Name: _____ (Name that appears on Pool records) **TIN:** _____ (Taxpayer Identification Number)

List the EPIC account number(s) to which this form applies:

- | | | |
|----------|----------|----------|
| 1. _____ | 4. _____ | 7. _____ |
| 2. _____ | 5. _____ | 8. _____ |
| 3. _____ | 6. _____ | 9. _____ |

PARTICIPANT INFORMATION: (All fields in this section must contain Sending Participant information ONLY.)

Add	Remove	EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number
		EPIC Participant Name	EPIC Account Number

SIGNATURE: (Please have a Contact, who is authorized per Pool records to update banking instructions, sign below.)

Authorized Signature _____ Date _____ Phone # _____

Print or Type Name of Authorized Signatory _____ Title/Position _____ Email Address _____

Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.

SEND VIA CONNECT: Log in to Account Access <i>Existing Connect</i> Click <input checked="" type="checkbox"/> Secure Contact <i>Users Only</i> Select file to upload - Send message	FAX TO: EPIC Client Services Group 1-888-535-0120	MAIL TO: EPIC Client Services Group P.O. Box 11813 Harrisburg, PA 17108
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POOL USE ONLY	
V2021.04	INITIALS
Processed	
Confirmed	