



Pax World Mutual Funds

Please mail to:
Pax World Funds
PO Box 9824
Providence, RI 02940-8024

Conversion Form (External) Roth IRA

To be completed when converting a Traditional IRA from another custodian or trustee to a Pax World Roth IRA.
DO NOT USE THIS FORM FOR A RECHARACTERIZATION.

1. Personal Information

First Name	Middle Initial	Last Name	Social Security/Tax ID No.
Street Address	City	State	Zip Code
Birthdate (mm/dd/yyyy)	Daytime Telephone	Evening Telephone	Email Address

Pax World Roth IRA Account Number (if applicable) _____

(If you are establishing a new Pax World Roth IRA you must also complete a Roth IRA Application).

2. Investment Instructions

Pax World Balanced Fund - 040	\$: _____	or	_____ %
Pax World Growth Fund - 042	\$: _____	or	_____ %
Pax World Small Cap Fund - 048	\$: _____	or	_____ %
Pax World International Fund - 047	\$: _____	or	_____ %
Pax World High Yield Fund - 044	\$: _____	or	_____ %
Pax World Women's Equity Fund - 046	\$: _____	or	_____ %
Pax World Global Green Fund - 049	\$: _____	or	_____ %
Pax World Money Market Account - 900	\$: _____	or	_____ %
	\$: _____	or	_____ %

3. Tax Withholding Instructions to the Custodian Trustee

Federal Tax Withholding: IRS regulations require the custodian/trustee of your Traditional IRA to withhold Federal Income Taxes from the conversion distribution amount at the rate of 10% unless you elect not to have withholding apply. Withholding will apply to the entire amount of the conversion distribution, including the amount of any non-deductible contributions which may have been made to the Traditional IRA. You may still invest the entire amount of the conversion distribution into your Pax World Roth IRA by using other assets to replace the amount withheld for Federal Income Taxes. If you use assets of your Traditional IRA to pay taxes on the conversion distribution amount (either by liquidating additional shares or by not replacing amounts withheld for Federal Income Tax), the IRA assets used to pay those taxes will be considered a premature distribution (since they are not being converted into a Roth IRA or rolled over into another Traditional IRA) and may also be subject to a 10% early withdrawal penalty. You may not convert any portion of a Required Minimum Distribution (RMD).

- I elect NOT TO have Federal Income Tax withheld from this conversion distribution from my Traditional IRA.
- I elect TO HAVE 10% Federal Income Tax withheld from this conversion distribution from my Traditional IRA.
- I elect to have _____ % Federal Income Tax withheld from this conversion distribution from my Traditional IRA.

State Tax Withholding: Your state of residence will determine your State Income Tax withholding requirements, if any. Those states with mandatory withholding will require state tax to be withheld from payments if federal taxes are withheld. Voluntary states let individuals determine whether they want state taxes withheld. Some states have no income tax on retirement payments. You may wish to consult with a tax advisor or your state's tax authority for additional information on your state requirements.

- I elect NOT TO have State Income Tax withheld from my retirement account distributions (only for residents of states that do not require mandatory state tax withholding).
- I elect TO HAVE the following dollar amount or percentage from my retirement account distribution withheld for State Income Taxes (for residents of states that allow voluntary state tax withholding): \$ _____ or _____ %.

4. Tell Us about Your Current Traditional IRA and Authorize Transfer from Your Current Custodian.

- To avoid delays check with your current custodian for their correct address and if they require a signature guarantee.
- Attach a copy of a current statement if possible.

Name of Current Custodian or Agent			
Street Address of Current Custodian or Agent ()	City	State	Zip Code
Daytime Telephone of Custodian			

Please transfer the following investments to PFPC Trust Co. as custodian for the Pax World IRA.

1. Fund Name or Type of Investment to be converted: _____

Account Number for Investment 1: # _____

Entire Account Partial \$: _____

For Certificates of Deposit

Immediately At Maturity (Date: _____)

2. Fund Name or Type of Investment to be converted: _____

Account Number for Investment 2: # _____

Entire Account Partial \$: _____

For Certificates of Deposit

Immediately At Maturity (Date: _____)

I authorize the above custodian of my Traditional IRA to liquidate the account(s) indicated for the purpose of converting them to a Roth IRA with Pax World Funds. I authorize my current custodian to issue a check payable to Pax World Funds for the benefit of my Roth IRA at Pax World Funds. I understand it is my responsibility to assure the prompt conversion of assets by the current custodian. I understand I am not eligible for a conversion if my adjusted gross income exceeds \$100,000 (single or joint) or if I am married and filing separately. I understand the conversion is irrevocable. I agree I am solely responsible for all tax consequences of this conversion. I authorize Pax World Funds and PFPC Trust Company to process this request on my behalf.

Signature of Roth IRA Participant (required)	Date
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Medallion Signature Guarantee (if required): An eligible guarantor is a domestic bank or trust company, securities broker/dealer, clearing agency or savings association that participates in a medallion program recognized by the Securities Transfer Agents Association. The three recognized medallion programs are the Securities Transfer Agents Medallion Program (known as STAMP), Stock Exchanges Medallion Program (SEMP), and the Medallion Signature Program (MSP). A notarization from a notary public is NOT an acceptable substitute for a signature guarantee.

Signature Guarantee Stamp and Signature (If required by your custodian or transfer agent)	Date
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<p>Medallion Signature Guarantee</p> 	<p>Medallion Signature Guarantee</p>
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Please convert the following investments to PFPC Trust Company as custodian for my Pax World Roth IRA.

PFPC Trust Company as custodian for Pax World Funds has established a Roth IRA for the above named shareholder and will accept the assets as a Conversion Contribution into the Roth IRA. If the above referenced account(s) is not a Traditional IRA, please do not process the request but return it to the shareholder.

To Be Completed By PFPC Trust Co. Custodian Only. Issue Check Payable To:

PFPC FBO _____

Account #: _____ SSN #: _____