



Regular mail: ESG Managers® Portfolios PO Box 9824 Providence, RI 02940-8024	Overnight mail: ESG Managers® Portfolios 101 Sabin Street Pawtucket, RI 02860-1427 Telephone: 888.374.8920
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Gift Transfer of Shares

Use this form to give shares of your ESG Managers® account as a gift to an individual or a charity. Since the transfer of shares does not result in a sale of securities, the donor does not incur a taxable event. However, a gift tax may be applicable. Please consult with your tax adviser for gift or inheritance questions. If you have any questions about this form please call Shareholder Services at 888.374.8920.

DONOR: Please complete Sections 1, 2, 3 and 4 then forward the original form and additional pages (if any) along with the ESG Managers® Prospectus and New Account Application to the recipient for completion.

1. Account Information: (As name(s) appear on your account statement)

Fund Name	Account Number		
Name	Social Security/Tax ID No.		
Name	Social Security/Tax ID No.		
Street Address	City	State	Zip Code
Daytime Phone	Evening Phone		

2. Gift Amount:

- Transfer shares: _____ shares
- Transfer dollars: \$ _____
- Transfer percentage of account: _____ %

3. Recipient of Shares/Gifts:

Please indicate to whom the shares should be transferred. Be sure to check with the organization to whom you are giving the shares to ensure that the name and address are correct; (i.e. should the shares be registered in the name of the organization, an endowment trust, special campaign, etc.?)

Name			
Name			
Street Address	City	State	Zip Code

4. Authorization and Medallion Signature Guarantee:

The account owner(s) listed in Section 1 must authorize this transfer of shares by signing below. (Sign in presence of bank officer or broker.) If account is trust, custodial, or corporate account, please sign in your capacity. If corporate account, also include a copy of your corporate resolution.

All registered owners of the donor account must have their signature(s) guaranteed by an eligible guarantor institution: 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 of Account Owner	Date	Signature of Account Owner	Date
Medallion Signature Guarantee		Medallion Signature Guarantee	

Please forward to the Recipient for acceptance, and instructions on disposition of shares.

Recipient: Please complete reverse side of form

Gift Transfer of Shares

To the Recipient: You are being given shares in an ESG Managers® Portfolio as indicated on the reverse of this form. Please complete this side of the Gift Transfer of Shares Form, the New Account Application (if applicable) and attach a copy of your Corporate resolution (for organizations). Please consult your tax advisor with any tax questions resulting from this transfer. Please call Shareholder Services at 888.374.8920 if you have questions about the Fund or did not receive a copy of the latest prospectus.

RECIPIENT: Please complete Sections A, B and C, then forward to ESG Managers® Portfolios, see address on reverse side.

A. Account information:

Existing Account

I/We currently have an account with ESG Managers® Portfolios, registered as indicated in Section 3 on the reverse of this form. The shares should be transferred to this existing account.

Fund Name (Must be the same Fund as the shares being transferred)		Account Number	
Name (As name(s) appear on account statement)		Social Security/Tax ID No.	
Name (As name(s) appear on account statement)		Social Security/Tax ID No.	
Address	City	State	Zip Code

Note: If the account registration is significantly different from that provided in Section 3, the form must be returned to the Donor for approval.

New Account

I/We do not currently have an account with ESG Managers® Portfolios as indicated in Section 3 on the reverse of this form. I/We have attached a completed New Account Application. (Application is required even if the recipient intends to redeem the gifted shares.)

Note: If the account registration is significantly different from that provided in section 3, the form must be returned to the Donor for approval.

B. Disposition of New Shares:

- Hold shares on deposit until further notice.
- Redeem shares as indicated below.
 - Redeem dollars: \$ _____
 - Redeem shares: _____
 - Redeem all shares.
- Mail check to the address of record as indicated in Section A.
- Wire funds to the following bank account*:

Bank Name	Bank Routing/ABA Number	This is a: <input type="checkbox"/> Checking <input type="checkbox"/> Savings Account
Bank Account Number	Name(s) on Bank Account	

**Note: you will need to have your signature(s) guaranteed (see section C) if the ESG Managers® account registration differs from the bank registration, or if the value of the redemption exceeds \$50,000.*

C. New Account Owners' Signatures and Acceptance:

Acceptance: By signing here, the owners of the account listed in Section A accept the gift of transferred shares. If you are requesting a wire redemption to a bank account that is registered differently from your mutual fund account (section A) or the check is payable to different owners and/or sent to a different address than that referenced in Section A, or the value of the redemption exceeds \$50,000, your signature(s) must be guaranteed by an eligible guarantor institution. 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	Date
Medallion Signature Guarantee (if required)	

Signature	Date
Medallion Signature Guarantee (if required)	