



# Retirement & Non-Retirement Accounts

DONOR/DONEE TRANSFER OF SHARES

## 1 Donor Account Information

### About the Donor

**i** FOR ASSISTANCE with this form, call Shareholder Services at (800) 662-0201, or Timothy Plan at (800) 846-7526.

COMPLETE AS NAME(S) APPEAR ON ACCOUNT STATEMENT.

NAME (First, Initial, Last) OR NAME OF TRUST OR ENTITY (if applicable)

TAXPAYER ID NUMBER OR SSN

JOINT NAME (if applicable)

TAXPAYER ID NUMBER OR SSN

ADDRESS

CITY

STATE

ZIP

DAYTIME PHONE NUMBER

TIMOTHY PLAN ACCOUNT NUMBER (if established)

### Donor Gift Amount

If no share class is indicated, Class A shares, if available, will be transferred first.

**i** GIFTS OF SHARES TO A CHARITY must be transferred in kind.

FUND NAME(S)

CLASS

ALLOCATION

1. \_\_\_\_\_

A C

\$ \_\_\_\_\_ %

2. \_\_\_\_\_

A C

\$ \_\_\_\_\_ %

3. \_\_\_\_\_

A C

\$ \_\_\_\_\_ %

4. \_\_\_\_\_

A C

\$ \_\_\_\_\_ %

### Recipient of Shares/Gift

**i** Be sure to check with the recipient to ensure that the name is correct. For example, find out if the shares should be registered in the name of an organization, endowment trust, special campaign, building fund, etc.

RECIPIENT NAME (Trustee, Custodian or Employer)

ACCOUNT NUMBER

PHONE NUMBER

JOINT RECIPIENT NAME (Co-Trustee, Minor, etc.)

### Donor Authorization

**!** **WARNING.** This application will not be processed unless signed by the Account Owner(s).

**i** **SIGNATURE GUARANTEE:** For gifts over \$10,000 in value, the signature of the account owners must be guaranteed by a financial institution of the type described in the Fund prospectus if changing the registration of an existing account. The Custodian will accept medallion guarantees obtained from banks or brokerage firms that are members of either the Securities Transfer Agents Medallion Program (STAMP), the New York Stock Exchange, Inc., Medallion Signature Program (MSP), or the Stock Exchanges Medallion Program (SEMP). A notary public is not an acceptable guarantor.

Donor must complete Section 1, as applicable, then forward this form to the recipient for acceptance, certification of taxpayer ID number and instructions on disposition of shares.

- Any tax questions resulting from this transfer or redemption of securities should be directed to your tax adviser. Enter the information exactly as it appears on your existing Timothy Plan account statement.
- Since the transfer of shares does not result in a sale of securities, the donor may not incur a taxable event; however, a gift tax may be applicable. Consult your tax adviser before making the transfer.
- If you are transferring shares from an account that has the check writing feature, make sure sufficient funds are left in your account to cover any outstanding checks.

SIGNATURE OF ACCOUNT OWNER

DATE

SIGNATURE OF JOINT ACCOUNT OWNER

DATE



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DONOR/DONEE TRANSFER OF SHARES



## Recipient Account Information

### About the Recipient

**i** FOR ASSISTANCE with this form, call Shareholder Services at (800) 662-0201, or Timothy Plan at (800) 846-7526.

COMPLETE AS NAME(S) APPEAR ON ACCOUNT STATEMENT. If the account registration is significantly different from that provided on page one, the form must be returned to the donor for approval.

**+** FOR CORPORATIONS, LLCs, PARTNERSHIPS: Please attach a duly executed resolution.

**+** FOR TRUSTS: Please attach the declaration page, designation of Trustee, Trustee's authority to transact securities transactions, and Trust signature page.

NAME (Trustee, Custodian, Corporation, etc.)

TAXPAYER ID NUMBER OR SSN

JOINT NAME (Co-Trustee, Minor, etc.)

TAXPAYER ID NUMBER OR SSN

NAME OF TRUST AGREEMENT (if applicable)

DATE OF TRUST (if applicable)

ADDRESS

CITY

STATE

ZIP

DAYTIME PHONE NUMBER

NAME OF FUND TYPE:  New Account  Existing Account

TIMOTHY PLAN ACCOUNT NUMBER

### Recipient Instructions

Provide instructions for the donated shares.

**i** SIGNATURE GUARANTEE: You will need to have your signature(s) guaranteed (see below) if the mutual fund registration differs from the bank registration or if you are requesting immediate redemption.

DESIRED ACTION: (Select One)

- Hold Shares in our account until further notice.
- Redeem Shares as indicated below and send check to the account of record above.
  - Redeem dollars \$\_\_\_\_\_ and hold remaining shares on deposit.
  - Redeem (number of) \_\_\_\_\_ shares and hold remaining shares on deposit.
  - Redeem all shares.
- Wire Funds to the bank listed in the Bank Information below.

### Dividend & Capital Gains Distribution

All dividends and capital gains will be reinvested in additional shares of the same fund and class if you do not make a selection.

\*You may only reinvest distributions in the same class of shares.

- A. DIVIDENDS:  Reinvest.  Paid in cash.  Direct to my Timothy Plan account\*: \_\_\_\_\_
- B. CAPITAL GAINS:  Reinvest.  Paid in cash.  Direct to my Timothy Plan account\*: \_\_\_\_\_

If you choose to have any dividends and capital gains paid in cash, please check one of the options below. If you do not make a selection, we will send them to you, by check, at your current mailing address.

Send dividends and capital gains to my bank account. (Complete Bank Information below.)

### Recipient's Bank Information

NAME OF BANK

BANK'S PHONE NUMBER

ABA ROUTING NUMBER

NAME(S) ON BANK ACCOUNT

BANK ACCOUNT NUMBER

ACCOUNT TYPE:  
 Checking  
 Savings

### Recipient Authorization

**!** WARNING. This application will not be processed unless signed by the Recipient Account Owner or authorized party.

**i** SIGNATURE GUARANTEE: For gifts over \$10,000 in value, the signature of the account owners must be guaranteed by a financial institution of the type described in the Fund prospectus. The Custodian will accept medallion guarantees obtained from banks or brokerage firms that are members of either the Securities Transfer Agents Medallion Program (STAMP), the New York Stock Exchange, Inc., Medallion Signature Program (MSP), or the Stock Exchanges Medallion Program (SEMP). A notary public is not an acceptable guarantor.

By the authorized signature(s) below, the recipient listed in Section 2 accepts the gift of transferred shares, authorizes the redemption requested (if applicable) and certifies under penalty of perjury that:

- The Social Security Number or Tax Identification Number given in this Section 2 is correct. If the correct number is not provided or this section of the form is not signed, the account owner(s) may be subject to IRS backup withholding on all distributions and redemptions and may be subject to an IRS penalty.
- I (We) are NOT currently subject to IRS backup withholding because (1) I (We) have not been notified, or (2) notification has been revoked. (Cross out "NOT" if you are currently subject to withholding.)

AUTHORIZED SIGNATURE (as listed in Section 1)

DATE

AUTHORIZED SIGNATURE (as listed in Section 1)

DATE



## Mailing Your Application

### Return Completed Form

USE YOUR PREFERRED MAILING METHOD.

REGULAR DELIVERY:

Timothy Plan  
c/o Ultimus Fund Solutions, LLC  
PO Box 46707, Cincinnati, OH 45246-0707

OVERNIGHT DELIVERY:

Timothy Plan  
c/o Ultimus Fund Solutions, LLC  
225 Pictoria Dr, Ste 450, Cincinnati, OH 45246

Phone | (800) 662-0201  
Local | (402) 493-4603  
Fax | (402) 963-9094