



WesMark Funds Shareholder Services
 1 Bank Plaza, 4th Floor
 Wheeling, WV 26003
 (800) 864-1013

Request for Transfer

This form is to effect a transfer from an existing account to an account with the WesMark Funds. The assets may be from a bank, insurance company, another fund family, or other financial institution.

Send all completed documents to: WesMark Funds Shareholder Services, 1 Bank Plaza, 4th Floor, Wheeling, WV 26003. If you have any questions or need assistance, please call (800) 864-1013.

PLEASE PRINT OR TYPE ALL SECTIONS AND SIGN SECTION 5.

1. INFORMATION ABOUT YOUR CURRENT FINANCIAL INSTITUTION (PLEASE ENCLOSE A COPY OF A RECENT STATEMENT)

Name of Financial Institution

Contact Person Phone Number

Address of Financial Institution

City State Zip

Name of Account Owner Account #

Type of Account Being Transferred: Traditional Roth SEP SIMPLE IRA Coverdell Education IRA
 Individual (Non-IRA) Joint (Non-IRA) Other _____

If transferring more than one account to WesMark Funds, please complete one form for each type of account, i.e. Individual and IRA

2. TRANSFER OF ASSETS TO WESMARK FUNDS Please select one

An account has been established in my name at the WesMark Funds. I direct you to:

- Liquidate all of the assets
- Liquidate a portion of my retirement plan account (please specify which assets)
 \$ _____ OR _____ % of (name of asset) _____ at your institution.
 (For additional assets, please provide a letter of instructions.)

- Transfer WesMark Funds in kind
- Transfer Certificate of Deposit (Choose one)
 - Liquidate prior to maturity. I am aware that I may incur a penalty for early withdrawal.
 - Liquidate at maturity. (Maturity date must be within 60 days. If maturity date is less than 15 days from the date of this request you may want to contact your current custodian to prevent automatic reinvestment of the account.)

3. INFORMATION ABOUT YOUR WESMARK FUNDS ACCOUNT Please select one

If you have an existing WesMark Funds account where you would like these assets to be transferred, please list this account number below. If you do not have a WesMark Funds account of the type necessary to receive the assets, make sure you enclose the appropriate completed Account Application, a copy of a recent account statement from your existing account and any forms required by your current financial institution or custodian/trustee. WesMark Funds will complete Section 6 acknowledging to the current financial institution or custodian/trustee that we are able to receive your transferred assets.

- Retirement Account Application enclosed Regular (Non-Retirement) Account Application enclosed
- Existing WesMark Funds Account Number _____

