

Please mail your completed form to:
Parnassus Investments
1 Market Street, Suite 1600
San Francisco, CA 94105

IRA Transfer Form

Use this transfer request form to transfer all of part of your IRA with another financial institution to Parnassus Funds. Note:

- If you are establishing a new IRA account with Parnassus, you must also attach a completed IRA Application.
- Complete a separate IRA Transfer Form for each account being transferred.
- If you have any questions about this form, please call us at (800) 999-3505.

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Shareholder Information Please Print

First Name _____ Middle Name _____ Last Name _____

Social Security No. _____ Date of Birth _____ Daytime Phone _____

2

Your Current Custodian/Financial Institution Information

Name of Financial Institution _____

Address _____
Street City State Zip

Contact Name _____ Telephone _____

Account No. _____ **Please enclose a copy of your current account statement.**

Account Type: Traditional IRA IRA-SEP Roth IRA Conversion Roth IRA IRA-Rollover

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Assets to be Transferred to your Parnassus IRA Account

Please indicate below how you would like your funds transferred.

Sell all assets in the account named in Section 2 and transfer funds to my Parnassus IRA.

Sell only the assets listed below and transfer the proceeds to my Parnassus IRA.

\$ _____ or _____ % of assets from _____ fund

\$ _____ or _____ % of assets from _____ fund

\$ _____ or _____ % of assets from _____ fund

Liquidate Certificate of Deposit (CD). Select one below.

Liquidate at maturity. (If maturity is less than 15 days from the date of this request, please contact your custodian bank to prevent automatic reinvestment.)

Liquidate immediately. An early withdrawal penalty may apply.

Transfer in-kind my Parnassus shares.

Please indicate in which fund(s) you would like to invest. The minimum to establish an IRA account is \$500 per fund; however, the minimum is waived if you sign up for our automatic investment plan with a minimum of \$50 subsequent investments.

Parnassus Fund	_____	%
Parnassus Equity Income Fund	_____	%
Parnassus Mid-Cap Fund	_____	%
Parnassus Small-Cap Fund	_____	%
Parnassus Workplace Fund	_____	%
Parnassus Fixed-Income Fund	_____	%

If you are transferring assets to an existing Parnassus IRA, please indicate your Parnassus Account No. _____

If you will turn age 70 ½ this year, or you are already over age 70 ½, please be reminded that you must withdraw your required minimum distribution amount by the deadline. The deadline for individuals who turn 70 ½ this year is April 1st of next year and for all others, the deadline is December 31st of this year. The IRS penalty for not taking a distribution of the mandatory amount by the deadline is 50%. Additionally, required minimum distributions are not eligible for rollover. Please contact your accountant or tax advisor for additional information and advice.

I certify to the current custodian, that I have established an IRA with the successor custodian that meets the requirements of the Internal Revenue Service to receive the transferring assets. I also certify to State Street Bank and Trust Company that the transferring assets meet the requirements of Internal Revenue Code Section 408(a) or 408A.

Signature

Date

Important: Please contact the current custodian to determine if they require a Signature Guarantee to process this transfer. A Signature Guarantee is a medallion stamp that may be obtained from your bank or broker. Your bank or broker will verify and guarantee your signature then stamp it with their Signature Guarantee Medallion.

Parnassus is authorized to accept the transfer of assets to an established IRA account on behalf of State Street Bank and Trust Company. State Street Bank and Trust Company accepts appointment as Custodian for the transferred assets described above. Please transfer cash or assets in-kind as directed above, payable as follows:

Parnassus Funds FBO _____

Participant

Parnassus Investments
1 Market Street, Suite 1600
San Francisco, CA 94105

Please contact Shareholder Services at 415-778-0200 if you have any questions.

Parnassus Authorized Signature

Date