



## FUND TRANSFER FORM

Accountholder: \_\_\_\_\_

Cert #: \_\_\_\_\_

### There Are Two Ways to Transfer Existing Funds in Your JRB Account

1. Log into your JRB account online (www.jrbcj.org) and click on "Log Into My Account". Contact the JRB at 888-JRB-FREE (572-3733) if you need assistance.
2. If you prefer the JRB to process the change for you, please complete and return this form to us via mail, fax (212-947-1676) or email to staff@jrbcj.org. **Please confirm requests made by email** by calling 888-JRB-FREE (572-3733). The JRB will process the transfer by the end of the next business day after receiving it. You will receive an email confirmation of the transfer.

**Transferring funds within your account does NOT change the way that future contributions will be allocated to your account.** If you would like to change your future contributions, please request an [Investment Change Form](#).

---

Transfer \_\_\_\_\_ out of \_\_\_\_\_ and reinvest \_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

---

Transfer \_\_\_\_\_ out of \_\_\_\_\_ and reinvest \_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

---

Transfer \_\_\_\_\_ out of \_\_\_\_\_ and reinvest \_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

\_\_\_\_\_ of this in \_\_\_\_\_  
S or % Fund Name

---

I authorize and direct the Joint Retirement Board of Conservative Judaism (JRB) to make the change(s) to my account as specified on this form. **Please confirm requests made by email** by calling 888-JRB-FREE (572-3733).

\_\_\_\_\_  
 Accountholder's Signature

\_\_\_\_\_  
 Date