



1105 State Route 121 North, Suite B
 P.O. Box 870 ■ Murray, KY 42071
 Office: 270.226.1000 ■ Fax: 270.226.1001
 TF: 888.753.6972 ■ KingdomTrust.com

Account Transfer

For All IRA Types

SECTION 1 - Account Holder Information

First Name: MI: Last Name:

Social Security Number: Date of Birth: Kingdom Trust Account Number:

Address:

City: State: Zip Code:

Daytime Phone Number: Email Address:

Kingdom Trust Account Type: Traditional IRA Roth IRA SEP IRA SIMPLE IRA Rollover IRA Beneficiary IRA

SECTION 2 - Releasing Custodian Information

Company: Contact:

Address:

City: State: Zip Code:

Phone Number: Account Number (with Releasing Custodian):

PLEASE ENCLOSE THE MOST RECENT STATEMENT FROM THE ACCOUNT BEING TRANSFERRED

SECTION 3 - Transfer Instructions

Directly transfer all or part of my present account with your organization in the manner indicated below:

Accepting Organization Name: Participant Name:

Kingdom Trust Account Number: Date First Participated: *(To be completed by present custodian/trustee)*

Type of IRA Being Transferred: Traditional IRA Roth IRA SEP IRA SIMPLE IRA* Rollover IRA Beneficiary IRA

* A SIMPLE IRA may only be transferred to another SIMPLE IRA if plan participation is less than two years. After you have participated in your employer's SIMPLE plan for two years, however, you may transfer from a SIMPLE IRA to to any other IRA other than a Roth IRA or may convert it to a Roth IRA.

Transfer the assets in the manner prescribed below:

Asset Description	Quantity in IRA	Quantity to Transfer	Liquidate Immediately (Y/N)	Transfer as Cash	In Kind
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

This Will (check one) Completely Transfer (and Close) My Current Account Partially Transfer My Current Account

I am aware that penalties may be incurred if time deposits are liquidated prior to their maturity date.

SECTION 4 - Delivery Instructions

Indicate how your current custodian should send funds and re-registration paperwork to Kingdom Trust by choosing one of the options below.

Delivery Options for Check Payments/Wire Transfers

- | | | |
|--------------------------------------|---|---|
| <input type="checkbox"/> Wire | <input type="checkbox"/> Overnight Check (FedEx or UPS)
Kingdom Trust
1105 State Route 121 N., Suite B
Murray, KY 42071 | <input type="checkbox"/> Mail Check (U.S. Postal Service)
Kingdom Trust
P.O. Box 870
Murray, KY 42071 |
|--------------------------------------|---|---|

When sending a check, whether through regular mail or overnight delivery, please be aware that funds will not be available for 2 days after the deposit has been made. **Please make check payable to "The Kingdom Trust Company, Custodian, FBO Account Holder's name, Account Number."**

Delivery Options for Re-Registration Paperwork

- | | |
|---|---|
| <input type="checkbox"/> Overnight Paperwork (FedEx or UPS)
Kingdom Trust
1105 State Route 121 N., Suite B
Murray, KY 42071 | <input type="checkbox"/> Mail Paperwork (U.S. Postal Service)
Kingdom Trust
P.O. Box 870
Murray, KY 42071 |
|---|---|

SECTION 5 - Depository Options

This section is required if transferring precious metals.

Please choose a depository option by checking the box immediately to the left of the Depository you wish to use (and doing the same for a specific location, if applicable). Once you have made your election(s), please choose whether you wish to have your metals stored in a non-segregated manner (aggregated together with the metals owned by other Kingdom Trust account holders) or in a segregated manner (stored separate from the metals owned by other Kingdom Trust account holders but still within the storage space leased to Kingdom Trust) by checking the box immediately to the left of your choice, if applicable.

- | | | |
|--|---|---|
| <input type="checkbox"/> Brinks Global Services* <ul style="list-style-type: none"> <input type="radio"/> California: 1120 W. Venice Blvd., Los Angeles, CA 90015 <input type="radio"/> New York: 184-45 147th Ave., Springfield Gardens, NY 11413 <input type="radio"/> Utah: 2179 S. 300 W., Ste. 4, Salt Lake City, UT 84115 | <input type="checkbox"/> Non-Segregated Storage | <input type="checkbox"/> Segregated Storage |
|--|---|---|

- | | | |
|---|---|---|
| <input type="checkbox"/> Delaware Depository 3601 North Market St., Wilmington, DE 19802 | <input type="checkbox"/> Non-Segregated Storage | <input type="checkbox"/> Segregated Storage (Gold Only) |
|---|---|---|

- | | |
|---|--------------------------------|
| <input type="checkbox"/> First State Depository 100 Todds Lane, Wilmington, DE 19802 | SEGREGATED STORAGE ONLY |
|---|--------------------------------|

- | | | |
|---|---|---|
| <input type="checkbox"/> International Depository Services (IDS) <ul style="list-style-type: none"> <input type="radio"/> Canada: 3300 Caroga Dr., Mississauga, ON, Canada LV4 1L4** <input type="radio"/> United States: 406 West Basin Rd., New Castle, DE 19720 | <input type="checkbox"/> Non-Segregated Storage | <input type="checkbox"/> Segregated Storage |
|---|---|---|

Sub-Account Number:

IF TRANSFERRING IN-KIND, A STATEMENT OF CURRENT METALS HOLDINGS MUST BE PROVIDED

* There will be a handling charge of \$25.00 per package for all material moved out of a Brinks account.

** In Ontario the Canadian government imposes a 13% Goods and Service Tax/Harmonized Sales Tax (GST/HST) on products entering Canada which do not meet a minimum purity requirement.

SECTION 6 - Age 70 ½ Reminder

I understand that if this transfer occurs during or after the calendar year during which I attain the age of 70 ½, the required minimum amount determined under this IRA must still be distributed. I further understand that the current trustee/custodian is not responsible for making this distribution prior to the transfer. I accept full responsibility for satisfying the required minimum distribution applicable to this IRA by withdrawing sufficient amounts from another IRA prior to the deadline for receiving minimum distributions for the calendar year of the transfer. If this transfer leaves the transferor IRA in one year but does not reach the transferee IRA until the following year, I understand that this will be an "outstanding transfer" as of December 31. The new IRA must "deem" that the transfer was received as of the prior December 31 for determining any required minimum distribution from the transferee IRA for the year that the transfer was received. I will inform the transferee IRA trustee/custodian of any such outstanding transfer.

SECTION 7 - General Provisions & Signatures

1. If I have chosen a Depository above, I acknowledge that I, as the Account Holder, am also solely responsible for choosing the Depository in which the metals purchased are stored. I also warrant that I have performed the due diligence I deemed necessary on the Depository I have chosen. I also warrant that neither Kingdom Trust nor any of its employees or agents has made any representations or recommendations to me concerning the Depository I have chosen other than to advise me to perform my due diligence on any Depository I might consider.
2. I acknowledge that Kingdom Trust is acting solely as a directed custodian and represent that it provided no tax, legal or investment advice.
3. I have reviewed and hereby consent to the Kingdom Trust Fee Schedule, which outlines all fees associated with the purchase, sale, packing, shipping and storage of precious metals (if applicable).
4. If transferring metals, I understand that all metals I direct to be transferred to my IRA through Kingdom Trust will be stored at the Depository I have selected in Section 5 above and hereby agree to said storage. I agree that the Depository I selected shall be solely responsible for the storage and safekeeping of all precious metals in my IRA.
5. I understand that commingling regular IRA contributions with previously rolled assets from an employer plan may preclude me from subsequently rolling over funds from my rollover "conduit" IRA into another qualified plan or 403(b) plan. With such knowledge, I authorize and direct the custodian/trustee to place these transferred IRA contribution assets in my rollover "conduit" IRA or visa versa. I acknowledge that certain transfers may be required to be reported to the IRS.
6. I hereby indemnify and hold Kingdom Trust harmless from any and all damages arising from or in connection with this Account Transfer.

Participant's Signature: Date: Participant's Printed Name: **Medallion Stamp (If Required)***

* A medallion guarantee is only required when the asset being transferred is a security.

Accepting Organization - Our organization agrees to serve as the new custodian or trustee for the IRA account of the above-named individual, and as custodian or trustee, we agree to accept the assets being transferred.

New Custodian or Trustee: EIN Number: Address: City: State: Zip Code: Authorized Signature for Accepting Organization: Date:

Kingdom Trust does not provide tax, legal or investment advice. It does not endorse or recommend any agent, company, or specific investment. Any information communicated by Kingdom Trust is solely for educational purposes and should not be construed as tax, legal or investment advice. Consultations with tax, legal and investment professionals is advised prior to making any decisions regarding your account.