

CLIENT

1

Submits: a) Transfer Authorization, b) Copy of amended LLC Operating Agreement showing the change of Custodian to: "Madison Trust Company, Custodian FBO [Your name & MTC Account #]", c) Documents certifying formation of the entity, d) Evidence that the entity is in good standing, and e) Copy of recent account statement from current Custodian.

MTC

2

Forwards the Transfer Authorization to the client's current Custodian requesting that they transfer your IRA's ownership interest in the LLC to MTC.

CURRENT  
CUSTODIAN

3

Prepares a transfer of ownership document and submits it to MTC.