



Use this form to transfer assets from your IRA into your IRA LLC.

**Please complete and submit this form via one of the following methods:**

**Mail:** Madison Administration Company, One Paragon Drive Suite 275, Montvale, NJ 07645 • **Fax:** (845) 947-1212 • **Secure Upload:** www.madisontrust.com/uploads

**A. ACCOUNTHOLDER INFORMATION**

Full name \_\_\_\_\_ Account number \_\_\_\_\_

**B. INVESTMENT INSTRUCTIONS**

Name of IRA LLC: \_\_\_\_\_

Assets to invest into the LLC:	_____	_____
	Asset name	Number of shares/units
(Invest all shares/units unless otherwise noted)	_____	_____
	Asset name	Number of shares/units
	_____	_____
	Asset name	Number of shares/units
	_____	_____
	Asset name	Number of shares/units

**C. DOCUMENT REQUIREMENTS**

Several documents may be required to complete this transaction, please see the appropriate Madison Trust flowchart based on the asset you wish to transfer.

**D. DELIVERY INSTRUCTIONS**

Send the documents via regular mail (default)     Send the documents via overnight mail (\$50 fee applies)

\_\_\_\_\_ Name \_\_\_\_\_ Address \_\_\_\_\_  
 \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

**E. ACKNOWLEDGEMENT, AUTHORIZATION, & SIGNATURE**

I hereby acknowledge that I am solely responsible for the investment instructions I am making. I agree to indemnify, hold harmless, and release Madison Trust and Madison Administration Company from any and all liabilities that either or both may incur directly or indirectly from my investment. I further acknowledge that I am solely responsible for the success or failure of this investment. I hereby authorize the transfer requested above for my Madison Trust IRA identified in Section A above.

\_\_\_\_\_ Accountholder signature \_\_\_\_\_ Date \_\_\_\_\_