

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

**Mail:** Madison Administration Company, 21 Robert Pitt Drive, Suite 201, Monsey, NY 10952 **Fax:** (845) 947-1212 **Secure Upload:** [www.madisontrust.com/uploads](http://www.madisontrust.com/uploads)

### A. ACCOUNTHOLDER INFORMATION

Full name

Account number

### B. INVESTMENT INSTRUCTIONS

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

Assets to invest into the LLC (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

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

For MTC use only:

Confirmed by

Date & time

DOB & SS confirmed

Assets are in IRA

Scanned