



# MADISON TRUST COMPANY

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

**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](http://www.madisontrust.com/uploads)

## A. ACCOUNTHOLDER INFORMATION

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

## B. INVESTMENT INSTRUCTIONS

Name of IRA Trust: \_\_\_\_\_

Assets to invest into the Trust:  (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 \_\_\_\_\_