

A Letter of Acceptance indicates Madison Trust's willingness to accept asset(s) that are to be transferred from another IRA or rolled over from a qualified retirement plan. Complete this form if you would like a Letter of Acceptance to be drafted by Madison Trust.

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

A. ACCOUNTHOLDER INFORMATION

Account holder name Last four digits of SSN Account holder's Madison Trust Company Account Number

Type of Account at Madison Trust: Traditional Roth SEP SIMPLE

B. REQUESTOR INFORMATION (if different from Account holder)

Name Firm Phone number

Fax number E-mail address Today's date

C. PLAN ADMINISTRATOR/CUSTODIAN INFORMATION

Current Plan Administrator/Custodian Name Account holder's Account Number at Current Plan Administrator/Custodian

Current Plan Administrator/Custodian Address (include city, state and ZIP)

Type of Retirement Plan/IRA with current plan administrator or custodian: 401(a) / 401(k) 403(b) 457(b)

Traditional IRA Roth IRA SEP IRA SIMPLE IRA Plan Name: _____

D. FORWARDING AND OTHER INFORMATION

Account holder wants funds sent to Madison Trust via: Check Wire (\$25 Incoming Wire Fee applies)

To whom and where should the Letter of Acceptance be forwarded?

Name Firm

Send by (select up to 2 options)

Mail, to the following address: _____

Fax, to: _____

E-mail, to: _____

For Madison Trust. Please do not fill in.

Letter of Acceptance

Please be advised that Madison Trust Company, as Custodian, is qualified to accept the requested transfer, and will hold the asset(s) in an IRA for the benefit of our mutual client named above. The undersigned as an authorized signatory for Madison Trust Company, Inc. hereby accepts the transfer of the above mentioned retirement asset(s).

Authorized Madison Trust signature Date (mm/dd/yy)