

LIST OF ASSETS BEING TRANSFERRED

Attach this form to the Account Application or Deposit Information form if you are rolling over or transferring assets to Madison Trust

Please submit this form along with your Account Application, Deposit Information, or Transfer Authorization.

A. ACCOUNTHOLDER INFORMATION

Full name

Account number

B. LIST OF ASSETS BEING TRANSFERRED

Asset name

Asset type

Asset value

Asset name

Asset type

Asset value

Asset name

Asset type

Asset value

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Asset name

Asset type

Asset value

C. AGREEMENT & SIGNATURE

The above is an accurate description of assets that I am transferring/rolling-over to my Madison Trust IRA.

Accountholder signature

Date