

LIST OF ASSETS BEING TRANSFERRED



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

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. LIST OF ASSETS BEING TRANSFERRED

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 _____