



This form is used only if you are transferring funds from an existing IRA. If you are rolling funds over from a 401(k), 457, 403(b), or a similar plan, contact your current administrator to initiate the rollover.

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
If your current IRA Custodian requires an original ink signed Transfer Authorization form, we will notify you of their requirement within 2 business days of receiving your form.

A. ACCOUNTHOLDER INFORMATION

Full name _____	Madison Trust Account Number _____	Madison account type: <input type="checkbox"/> Traditional IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SEP IRA <input type="checkbox"/> SIMPLE IRA <input type="checkbox"/> Inherited Traditional IRA <input type="checkbox"/> Inherited Roth IRA
Client date of birth _____	Client Social Security Number _____	

B. IRA TO BE TRANSFERRED

Please select one: Traditional IRA Roth IRA SEP IRA SIMPLE IRA Inherited Traditional IRA Inherited Roth IRA
If you don't know what type of IRA you currently hold, please contact your current IRA custodian.

Custodian name _____	Account number (Please limit to one account per form) _____
Custodian address _____	Contact person (if applicable) _____
City, State, ZIP _____	Custodian phone number _____

C. CASH/ASSETS TO BE TRANSFERRED

Cash – Please contact your current financial institution to ensure that sufficient cash is available, if there isn't, please ask them to liquidate your assets and turn them into cash.
 Transfer all available cash
 Liquidate all assets, then transfer all cash **Please note that this option is only offered by some IRA Custodians. Please check with your current Custodian to verify whether they accept liquidation instructions from receiving institutions.**
 Transfer some cash in the amount of \$ _____ **Please contact your current financial institution to ensure that sufficient cash is available. If it isn't, please ask them to liquidate your assets and turn them into cash.**

Assets – Madison cannot accept publicly traded securities. Use this section for transferring "alternative assets." **Some asset transfers require additional documentation, please see the appropriate flowchart on our website under the Forms/Fees tab.**

Transfer the following assets:

Asset name _____	Asset type _____	Approximate asset value _____
Asset name _____	Asset type _____	Approximate asset value _____
Asset name _____	Asset type _____	Approximate asset value _____
Asset name _____	Asset type _____	Approximate asset value _____

Note: If you are transferring more than 4 assets, please attach a List of Assets Being Transferred form.



D. FULL/PARTIAL TRANSFER *This field is required*

Please select one:

- Partial Transfer Complete Transfer (Please note: This will close your account. Contact your current custodian for their closing requirements.)

E. TRANSFER INSTRUCTIONS

Please choose how you would like the custodian of your current IRA to transfer your cash/assets to Madison Trust.

- Wire (\$25) UPON RECEIPT A WIRE TAKES 1 BUSINESS DAY TO CLEAR
 Institution Name: Wells Fargo Bank, N.A. Acct. Name: Madison Trust Company
 Routing Transit No.: 121000248 Acct. No.: 79437021309935056
 For Further Credit: FBO [Accountholder's name] [MTC Account #]
 Please assign all asset transfers to Madison Trust Company, Custodian FBO [client's name and Madison account number] and forward to Madison Administration Company, 1 Paragon Drive, Suite 275, Montvale, NJ 07645.
- Check ONCE DEPOSITED, A BANK/INSTITUTION/CERTIFIED CHECK TAKES 5 BUSINESS DAYS TO CLEAR
 Make checks payable to: Madison Trust Company Custodian FBO [client's name and Madison account number] and forward to Madison Administration Company, 1 Paragon Drive, Suite 275, Montvale, NJ 07645.

F. MADISON TRUST PROCESSING TIMES AND FORM DELIVERY METHOD

Processing time and delivery method is in regards to Madison Trust Company submitting the request to your current custodian. Turnaround time and delivery method back to MTC is strictly subject to your external custodian.

Processing Times:

- Standard Processing: Transfer request will be sent in 4 business days. (default)
 Expedited Processing: Transfer request will be sent next business day. (\$50)

Delivery Methods:

- Standard Delivery (default) Overnight Delivery (\$50 fee applies)

Please note: Any forms received after 1 p.m. EST will be considered received on the following business day (applies to both standard and expedited processing.)

G. ACCOUNTHOLDER AUTHORIZATION

Although MTC does not require a Medallion Signature Guarantee for transfers, your current custodian may have this requirement. Please verify with your custodian if they require a Medallion. NOTE: **A medallion can be provided by ANY financial institution with whom you have a relationship** and need not be from the transferring institution.

With my signature I acknowledge that the appointment of Madison Trust as Custodian will become effective upon receipt of the assets from the prior custodian/trustee. I further acknowledge that Madison Trust assumes no liability for the action or inaction of the prior custodian/trustee as to the proper and timely transfer of funds.

I confirm that assets to be transferred into the Custodial Account do not include any illegal or impermissible investments under South Dakota or Federal law, including, but not limited to, holdings of marijuana or other illegal substances, illegal gambling, or illegal artifacts. I further confirm that the Custodial Account will not hold or engage in transactions involving illegal holdings while Madison Trust Company serves as custodian, and should the Custodial Account ever come to hold an illegal or impermissible investment under South Dakota or Federal law, I will notify Madison Trust Company immediately.

Medallion Signature Guarantee (if required)

 Accountholder signature

 Date (mm/dd/yy)

! **IMPORTANT!** Please attach a copy of your most recent account statement from the financial institution from which you are transferring.

Madison Trust will submit the completed Transfer Authorization form along with our Letter of Acceptance to your current custodian.