



MADISON TRUST COMPANY

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:
Client date of birth _____	Client Social Security Number _____	<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

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 ****this section is required****

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 \$ _____

Assets – Madison cannot accept publicly traded securities. Use this section for transferring "alternative assets." **Some asset transfers require additional documentation, please contact transfers@madisontrust.com for additional details.**

Transfer the following assets:

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

Note: If you are transferring more than 2 assets, please attach a List of Assets Being Transferred form.

D. FULL/PARTIAL TRANSFER ****this section is required****

Please select one:

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



MADISON TRUST COMPANY

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: Capital One Bank, N.A. Acct. Name: Madison Trust Company
Routing Transit No.: 065000090 Acct. No.: 7527846263
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)

Transfer Form Delivery Methods:

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

Please note: Any forms received after 1PM 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 most financial institutions 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.

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.

Below Section is 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, an authorized signatory of Madison Administration Company, LLC, hereby accepts the transfer of the above mentioned retirement asset(s) as agent for Madison Trust Company, Custodian.

Signature

Date (mm/dd/yy)