

Instructions for Transferring your IRA to another IRA Provider

1. If you have not done so already, please visit <https://secure.mtrustcompany.com> to register and confirm your account. **Your transfer cannot be processed until this is completed.**
2. Call your new provider to obtain the paperwork to transfer your funds.
3. Complete and submit the new provider's IRA Transfer paperwork.

Please make sure to include the following:

- Your signature
- Millennium Trust Company listed as the current custodian
- Account type at Millennium Trust
- Account type at the new provider
- At least two of the following identifying items:
 - o Millennium account number
 - o Social security number
 - o Date of birth
 - o Current address

If you choose to transfer securities, such as stocks or mutual funds, instead of liquidating your holdings and transferring cash, and the value of the securities is over **\$200,000**, an **Original** signature and **Original Signature Guarantee** stamp on the transfer form is required.

4. Submit the completed paperwork to the new provider. Your new provider will review your request, and if accepted, will sign and submit to Millennium Trust to process the transfer.

Please note:

- Cash transfers to the new custodian are sent by check via USPS unless otherwise directed.
- If you choose to have cash sent by wire, a \$30 wire transfer fee will be charged.
- Millennium Trust Company, LLC is not a bank or brokerage firm and therefore transfers are non-ACAT eligible, meaning they are not completed through an automated process and may take additional time to transfer
- Transfers are processed in the order that they are received, and depending on volumes, the processing time can be up to 15 business days.

If you have any questions, please visit our website to chat with us, email us at arp@mtrustcompany.com, or call us as 877.682.4727. Our business hours are Monday – Friday, 7:00am to 6:00pm CT.

Note: If the investment in your account is holding only cash or is an annuity, you will only receive one annual statement at the beginning of the year.