MILLENNIUM TRUST COMPANY

ABOVE AND BEYOND CUSTODY

Instructions for Transferring your IRA to another IRA Provider

1. Complete and submit the new provider's IRA Transfer paperwork to start the process. Please make sure to include the following:
    a. Your signature of consent
    b. New provider's signature of acceptance
    c. Delivery instructions for the new provider – if requesting a check, provide who the check is to be made payable
    d. Faxed or scanned copies of the completed document are accepted only if the signature guarantee is not required. The completed document may be emailed to arp@mtrustcompany.com or faxed to 630.368.5697.
    e. For transfers over **$200,000,** an **Original** signature and **Original Signature Guarantee** stamp on the transfer form is required.
        i. If signature guarantee stamp is required, please mail the transfer form, including original wet signatures to:

            Millennium Trust Company, LLC
            Attention: RS Distribution Department
            2001 Spring Rd., Suite 700
            Oak Brook, IL 60523

2. Transfers requested to be sent via wire, will be subject to a $30 wire transfer fee.
    a. Millennium Trust Company, LLC is not a bank and therefore NOT ACAT eligible.

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 the new provider requires a current statement, please contact client service representatives at 877.682.4727 during regular business hours, Monday – Friday from 8:00 am – 4:30 pm CT or via email at arp@mtrustcompany.com.

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.