# Instructions for Transferring your IRA to another IRA Provider

1. Call your new provider to obtain the paperwork to transfer your funds.
2. Complete 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
   - ☐ Delivery instructions for the new provider, including payee name
   - ☐ Signed letter of acceptance from an authorized representative of 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.

   If transferring mutual funds "in-kind" or re-registering the assets, please ensure the receiving custodian includes their mutual fund account numbers for those assets, otherwise the transfer request may be rejected.

3. You must submit the completed paperwork to the new provider.
4. Your new provider will then review your request, and if accepted, will sign and submit to Millennium Trust to process the transfer in the following manner:

   - Any forms requiring a Notary stamp or Original Signature Guarantee must be mailed back to:

     Millennium Trust Company
     2001 Spring Road, Suite 700
     Oak Brook, IL 60523

   - Fax to 630.368.5697
   - Email scanned documents to arp@mtrustcompany.com

**Please note:**

- If your new custodian requires a statement to complete your transfer, you can download one within the MTC Investment Platform by selecting Account Details > Account Documents.
    - If the investment in your account is holding cash only, a stable value fund, or is an annuity, you will receive one annual statement per year.
    - To generate a custom holdings & transactions report, select Account Reports and then Run. Please choose account and date range to run your custom report. You will be able to see and download your customized report under Report History once it is available.
- 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.

If you have any questions, please visit our website to chat with us, email us, or call us at 800.258.7878. Our business hours are Monday – Friday, 7:00am to 8:00pm CT.