



2001 Spring Road, Suite 700
 Oak Brook, IL 60523
 800.618.6177 Individual Service Team
 866.388.5464 Institutional Service Team
 800.560.1288 Investment Advisor Service Team
 630.472.5392 Fax
distributions@mtrustcompany.com

INTERNAL TRANSFER AUTHORIZATION

For internal transfer of funds from one Millennium Trust account to another. You must have ownership on an existing account before an internal transfer can be made. Please print, sign and return to Millennium Trust after completion. For assistance with this form, please contact a Client Service Specialist during regular business hours, Monday - Friday, 7:00 am to 6:00 pm Central time.

A Account Owner's Information

Enter Account Owner's full name. ▶ First: Middle: Last:
 Social Security No. (9 digits required): Daytime Phone No.:
 E-mail Address:

B IRA Transfer Compatibility

Not all internal transfers between IRA account types are compatible; there may be additional steps and forms required in some cases. We recommend you speak with your own tax or financial advisor.

From Account No.: *transfer to* **Account No.:**

Account Type

Choose only one account type. ▶

Traditional IRA	▶	Traditional IRA	SEP IRA
Inherited Traditional IRA	▶	Inherited Traditional IRA	
Roth IRA	▶	Roth IRA	
Inherited Roth IRA	▶	Inherited Roth IRA	
SEP IRA	▶	SEP IRA	Traditional IRA
SIMPLE IRA	▶	SIMPLE IRA	Traditional IRA (after 2 years from date of 1st deposit)

Please continue to page two to complete this form.



C Transfer for Taxable Accounts

Incomplete information may delay the transfer.

Complete for an internal transfer from one taxable account to another taxable account within Millennium Trust (excludes Qualified Plans). **Note:** For a transfer from an IRA to a taxable custody account you will be required to complete the IRA Distribution Request form.

From Taxable Custody Account No.: *transfer to* **Taxable Custody Account No.:**

D Transfer Information

Please choose only one of the following: Either a **Full or Partial** transfer.

- Full Transfer** (Transferring ALL assets and closing the account)
 - Liquidate all assets and transfer entire balance as cash.
 - Transfer my entire account "In-Kind". *Please specify the types of assets currently held in your account.*
 - Cash only
 - "In-Kind" assets only
 - Both cash and "In-Kind" assets
- Partial Transfer** (Transferring only some assets)
 - ALL available cash
 - Transfer the following amount in cash: \$
 - Transfer In-Kind only the non-cash assets listed in the table below

Non-Cash "In-Kind" Assets:

Liquidation or Re-Registration fees may apply. ▶	Liquidate	or	Re-Register	Asset Name/Description	Dollar Amt/All
	<input type="radio"/>		<input type="radio"/>		
	<input type="radio"/>		<input type="radio"/>		
	<input type="radio"/>		<input type="radio"/>		
	<input type="radio"/>		<input type="radio"/>		

If additional space is needed, please attach a separate page.

E Transfer Authorization

I authorize Millennium to transfer these assets to another account at Millennium as designated herein.

If multiple Account Owners on current account, each must sign to authorize this transfer. ▶

Print name: _____ Date: _____

Signature: _____

Print name: _____ Date: _____

Signature: _____