

the primary trend

FUNDS

IRA/CESA TRANSFER FORM

Please complete this form to transfer an existing IRA or other retirement plan to The Primary Trend Funds. Return this form to U.S. Bancorp Fund Services, LLC and they will do the rest. If you have any questions, please call U.S. Bancorp at (800) 968-2122.

Mail to: **THE PRIMARY TREND FUNDS**
 c/o U.S. Bancorp Fund Services, LLC
 P.O. Box 701
 Milwaukee, WI 53201-0701

REGISTRATION

Name (please print)	Social security number	Date of birth
Address	Daytime phone	
City	State	Zip
	Evening phone	

TRANSFER INSTRUCTIONS

Before sending your completed transfer request to The Primary Trend Funds, please call your current custodian to obtain their correct address, and inquire about any special instructions or requirements. Transfers normally take 4 to 6 weeks to complete. Please provide complete information about the current custodian or trustee of your IRA, employer-sponsored plan or 403(b) plan.

1. Current account information:

Current custodian, trustee, or plan administrator/employer	Name of plan <i>(for an employer-sponsored plan or 403(b) plan)</i>
Street or P.O. Box	Account number
City	Contact person
State	Estimated date of distribution
Zip	
Telephone number	

2. Please transfer my investment from *(check type of plan)*:

- | | | | |
|----------------------------------|---------------------------------------|--|--|
| <input type="checkbox"/> IRA | <input type="checkbox"/> Rollover IRA | <input type="checkbox"/> Roth IRA | <input type="checkbox"/> 403(b) Plan |
| <input type="checkbox"/> SEP IRA | <input type="checkbox"/> SIMPLE IRA | <input type="checkbox"/> Conversion Roth IRA | <input type="checkbox"/> Employer-Sponsored Plan |
| | | <input type="checkbox"/> Coverdell Education Savings Account | |

3. Please sell or redeem *(check one)*:

- All of the assets from my IRA or retirement plan
- Part of the assets [\$ _____ or _____ %] from my IRA or retirement plan

4. Please send the proceeds by check, made payable to The Primary Trend Funds *(check one)*:

- Immediately
- At maturity *(date)* _____

