

Request for Transfer of Assets or Direct Rollover Investor Services 800-243-1575

- To expedite your request please contact your current Custodian or Employer to ensure all necessary forms are submitted, including a copy of your most recent statement.
- Sign and mail your completed TOA form along with any current Custodian's or Employer's required forms and a new Selected IRA application (if you do not already have a Selected IRA account) to: **Selected Funds, PO Box 219662, Kansas City, MO 64121-9662**. For overnight mail: **Selected Funds, 430 W 7th Street, Suite 219662, Kansas City, MO 64105-1407**.

A. ACCOUNT REGISTRATION – Please type or print clearly.

Name

 Address

 City State Zip Code + 4
 () -
 Daytime Telephone Number Social Security Number

B. ASSETS ARE MOVING FROM THIS ACCOUNT – Please attach a copy of your most recent statement.

Name of Custodian

 Address of Custodian

 City State Zip Code + 4
 () -
 Telephone Number of Custodian

C. INSTRUCTIONS TO DELIVERING TRUSTEE/CUSTODIAN – Please select one option below.

From my current plan type: Traditional ROTH SEP SIMPLE 403(b) Other Employer Retirement Plan ESA

TRANSFER/ROLLOVER INSTRUCTIONS

- Option 1 – Liquidate** – Choose this option if you are not currently invested in shares of Selected Funds. Also, please complete Section D.
Please liquidate the account(s) listed below and issue check payable to SELECTED FUNDS.

Name of Mutual Fund or Investment Transferring From	Account Number	Amount	or	Percentage
<input type="text"/>	<input type="text"/>	\$ _____		_____ %
<input type="text"/>	<input type="text"/>	\$ _____		_____ %
<input type="text"/>	<input type="text"/>	\$ _____		_____ %
<input type="text"/>	<input type="text"/>	\$ _____		_____ %

If you are liquidating from a Certificate of Deposit (CD):

Amount to liquidate: All Partial Liquidation of \$ _____ When to liquidate: Immediately At Maturity*

*Please send completed paperwork to Selected Funds 30 days prior to maturity date.

- Option 2 – Transfer all of my existing Selected Funds** – Choose this option if you currently own and are trying to transfer/rollover shares in a Selected Fund “in kind”. A transfer/rollover “in kind” is a movement of currently owned Selected Funds from one custodian to Selected Funds without liquidating the shares. Please complete Section D as well.

Existing Account Number Amount or Percentage
\$ _____ %

