



IRA Rollover / Asset Transfer



If you wish to transfer an existing IRA to Saturna Capital, please complete this form. Attach a copy of your most recent statement from your existing IRA custodian. To transfer an IRA held by a brokerage firm to Saturna Brokerage Services, please also complete the Transfer of Assets form (in the brokerage brochure) as well as the Saturna Brokerage Account Application.

Mail completed form(s) and other documents to: **Saturna Capital, P.O. Box N, Bellingham, WA 98227-0596**

Description of IRA to be transferred:

Account Name:

Address:

Primary Social Security or Tax ID Number:

Account Number:

Name of Custodian Firm currently holding your account:

Custodian Firm's Address:

Custodian Firm's Phone Number:

Type of existing IRA:

- Individual
- Employer Plan
- Roth IRA
- Roth Conversion IRA

To Current Custodian:

I authorize you to (choose only one option):

- Liquidate (sell) ALL Assets
- Liquidate (sell) PART \$
- Transfer ALL shares in kind*
- Transfer PART # or % of shares in kind*
of (fund name or symbol)

to the Saturna Capital IRA I have established with Saturna Trust Company (EIN 26-3918998), a qualified Non-Bank Trustee under IRS Regulation 1.401-12(n). Please identify to Saturna the amount of contributions made for the current year (if any).

Note: Liquidation for rollover/transfer is a non-taxable event. Proceeds should be mailed to Saturna Trust Company as Trustee. *Brokerage account required for non-Saturna mutual funds.

Signature:

Account Owner

Date

MEDALLION SIGNATURE GUARANTEE

Investment Instructions:

- Open a new Saturna Capital IRA for me. I have completed the Saturna IRA Application and enclosed a copy of a recent statement of the account to be transferred.
- Consolidate my IRAs by depositing proceeds from this transfer to my existing Saturna Capital IRA.
- One time transfer to my Saturna Capital HSA.

Saturna Account Number (if available):

Allocation:

- Amana Income \$ or %
- Amana Growth \$ or %
- Amana Developing World \$ or %
- Sextant Growth \$ or %
- Sextant International \$ or %
- Sextant Core \$ or %
- Sextant Short-Term Bond \$ or %
- Sextant Bond Income \$ or %
- Saturna Brokerage* \$ or %

*Requires brokerage account.

Custodian Acceptance:

Saturna Trust Co. is willing to accept the assets described herein and credit them to the selected Saturna Capital IRA for which we are Trustee/Custodian. Please liquidate and transfer from fiduciary to fiduciary as authorized above.

Mail check to: Retirement Plans, Saturna Capital, Box N, Bellingham WA 98227-0596.

Saturna Use Only

Accepted by: _____ Date: _____