



IRA 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:

SEP

SIMPLE

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 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.

Saturna Account Number (if available):

Allocation:

<input type="checkbox"/> Amana Income	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Amana Growth	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Amana Developing World	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Growth	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant International	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Core	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Short-Term Bond	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Bond Income	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Saturna Brokerage*	\$ <input type="text"/>	or	<input type="text"/> %

*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: _____