



Individual Retirement Account — Cash Transfers

USE THIS FORM TO: Request a liquidation of securities and transfer of cash from an existing IRA to Saturna Capital

DO NOT USE THIS FORM TO: Transfer brokerage assets in kind or to transfer Amana or Sextant shares from another custodian to Saturna. Please use Saturna's Non-ACAT Transfer Form or the Brokerage Transfer form, available online at www.saturna.com. You can email clientservices@saturna.com for additional assistance.

EMAIL AND FAXED CASH TRANSFER FORMS WILL NOT BE ACCEPTED

Checklist to ensure your request is in good order:

1. Provide the original completed and signed IRA Cash Transfer
2. Provide a copy of your most recent statement for the account being transferred
3. Provide a copy of your photo government issued identification
4. Mail all documents to: Saturna Capital

Saturna Capital
1300 N State Street
Bellingham, WA 98225
clientservices@saturna.com

Type of Account

- ☐ Traditional IRA ☐ SEP IRA ☐ Beneficiary IRA ☐ Rollover IRA
☐ Roth IRA ☐ SIMPLE IRA ☐ Beneficiary Roth IRA

Account Owner

Full Legal Name Preferred Salutation (optional): ☐ Mr. ☐ Mrs. ☐ Ms. ☐ Dr.

Social Security Number

Address

City	State	Zip
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Preferred Phone

- ☐ Single
☐ Married
☐ Divorced
☐ Widowed

Custodian Firm currently holding your account:

Custodian Firm's Address

City	State	Zip
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Custodian Firm's Phone Number

Account Number (at current Custodial Firm):

To Current Custodian

I authorize you to (choose only one option):

- ☐ Liquidate (sell) ALL Assets ☐ Liquidate (sell) PART \$

and send proceeds 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).

Note: Liquidation for transfer is a non-taxable event.

Signature:

MEDALLION SIGNATURE GUARANTEE

Account Owner

Date

Please continue to Investment Selection on next page.

IRA Cash Transfers (continued)

Investment Selection 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 Registration Number [†]

Saturna Brokerage Account Number [†]

[†] If available

Investment Allocation

Affiliated Funds*

<input type="checkbox"/> Amana Growth <i>Institutional</i>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Amana Developing World <i>Institutional</i>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Amana Income <i>Institutional</i>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Amana Participation <i>Institutional</i>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Growth Z Shares	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant International Z Shares	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Core	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Sextant Global High Income	\$ <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 Sustainable Equity	\$ <input type="text"/>	or	<input type="text"/> %
<input type="checkbox"/> Saturna Sustainable Bond	\$ <input type="text"/>	or	<input type="text"/> %

* To link a bank account and/or set up automatic investment, complete the Saturna *Electronic Funds Transfer Form* (found on www.saturna.com/forms#/saturna-capital)

Non-affiliated Funds**

<input type="checkbox"/> Self-directed Brokerage	\$ <input type="text"/>	or	<input type="text"/> %
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Custodian Acceptance - Required Signature of Saturna Capital as Custodian/Trustee

Saturna Trust Company will 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.

For Broker-Dealer Use Only:

Signature of Saturna Capital as Custodian / Trustee

Date

Checklist of Items for Your IRA Transfer

To help avoid any processing delays, please be sure the following actions have been completed prior to mailing this request:

- ☐ Contact current custodian for any exit paperwork or other required steps to complete the transfer.
- ☐ Fill out this form in its entirety and sign it. **Digital signatures are not accepted.**
- ☐ Enclose a copy of your government-issued photo ID with signature.
- ☐ Enclose a copy of your most recent statement from current custodian.

Mail original completed forms:

Saturna Capital
1300 N State Street
Bellingham, WA 98225

If at any time you have questions or need help filling out this form, please call us toll-free at **1-800-SATURNA (1-800-728-8762)**.