



# 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 Saturna 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](http://www.saturna.com). You can email [clientservices@saturna.com](mailto: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](mailto:clientservices@saturna.com)

**Type of Account**

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

**Account Owner**

- Single  
 Married  
 Divorced  
 Widowed

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

Social Security Number

Address

City	State	Zip
------	-------	-----

Preferred Phone

Custodian Firm currently holding your account:

Custodian Firm's Address

City	State	Zip
------	-------	-----

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:**

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 <sup>†</sup>

Saturna Brokerage Account Number <sup>†</sup>

<sup>†</sup> If available

## Investment Allocation

### Affiliated Funds\*

- |  |   |    |  |
|--|---|----|--|
| <input type="checkbox"/> <b>Amana Growth Institutional</b>           | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Amana Developing World Institutional</b> | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Amana Income Institutional</b>           | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Amana Participation Institutional</b>    | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Growth Z Shares</b>              | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna International Z Shares</b>       | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Core</b>                         | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Global High Income</b>           | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Short-Term Bond</b>              | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Bond Income</b>                  | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Sustainable Equity</b>           | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |
| <input type="checkbox"/> <b>Saturna Sustainable Bond</b>             | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" type="text"/> % |

### Non-affiliated Funds\*\*

- |   |   |    |  |
|---|---|----|--|
| <input type="checkbox"/> <b>Self-directed Brokerage</b> | \$ <input style="width: 100px;" type="text"/> | or | <input style="width: 100px;" 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](http://www.saturna.com/forms#/saturna-capital))

## 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)**.