



SATURNA



TRUST COMPANY

401(k) Account Transfers

Complete this form to transfer an existing IRA to Saturna Trust Company. **Please attach a copy of the most recent statement from your existing IRA custodian and a copy of your government-issued photo ID.**

To transfer an IRA held by a brokerage firm to Saturna Brokerage Services, please complete a Saturna Brokerage Account Application and the Transfer of Assets (ACAT) Form.

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

Mail completed forms and copy of the most recent statement from your existing IRA to:

**Saturna Trust Company
P.O. Box N
Bellingham, WA 98227-0596**

401(k) Employer Sponsor:

Saturna Registration Number (if available):

Account Owner (Grantor):

Mr. Mrs./Ms. Dr.

First Name

M.I.

Last Name

Single Married Divorced Widowed

Address (as it appears on your IRA statement):

City

State

Zip

Daytime Phone Number:

Primary Social Security or Tax ID Number:

Type of existing account:

- Traditional IRA
- Roth IRA
- SEP IRA
- SIMPLE IRA
- Rollover IRA
- Direct Transfer from an existing IRA

Custodian Firm currently holding your IRA account:

Custodian Firm's Address:

City

State

Zip

Custodian Firm's Phone Number:

IRA Account Number (at current Custodian Firm):

Funds will be invested based on effective allocation at the time funds are received. If no allocation has been selected the funds will be invested in Plan Qualified Default investment.

To Current Custodian

I authorize you to (choose only one option): Liquidate (sell) ALL Assets Liquidate (sell) PART \$ and send proceeds to the Saturna Trust Company (EIN 26-3918998), a qualified Trustee under IRS Regulation 1.401-12(n).

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

Signature:

Account Owner

Date

MEDALLION SIGNATURE GUARANTEE

Check List of Items for Your IRA Transfer or Rollover

To help avoid any processing delays, complete the following actions prior to submitting this request:

- Fill out this form in its entirety and sign it
- Enclose a copy of your most recent statement from current custodian

*To transfer Amana or Sextant shares from another custodian to Saturna, please use Saturna's **Non-ACAT Transfer** form.*

Custodian Acceptance

Saturna Trust Co. will accept the assets described herein and credit them to the selected 401(k) Plan for which we are Trustee/Custodian. Please liquidate and transfer from fiduciary to fiduciary as authorized above.

Mail check to:

**Saturna Trust Company
Retirement Plans
P.O. Box N
Bellingham WA 98227-0596**