



## IRA Transfer Form

Complete and send to:

By mail: Thomas White Funds  
c/o US Bancorp Fund Services, LLC  
P.O. Box 701  
Milwaukee, WI 53201-0701

By courier: Thomas White Funds  
Shareholder Services Center  
615 East Michigan Street 3rd Floor  
Milwaukee, WI 53202

### INSTRUCTIONS

Use this form when transferring funds from an *existing* IRA to a Thomas White Funds IRA. If you are establishing a new account, you must also complete a Thomas White Funds IRA Application.

#### INVESTORS ARE REMINDED THAT:

- Your current custodian/trustee may require that you obtain a signature guarantee to process this transfer.
- You should be able to obtain a signature guarantee from a bank, broker-dealer, credit union (if authorized under state law), securities exchange or a savings association. **A notary public cannot provide a signature guarantee.**

### Section 1

#### INVESTOR INFORMATION

Name	Social Security Number	
Address		
City	State	ZIP
Daytime Phone Number	Evening Phone Number	

### Section 2

#### PLEASE TRANSFER MY IRA FROM:

Name of Current Custodian (Bank, Savings and Loan, Mutual Fund, Etc.)		
Address		
City	State	ZIP
Account Number or Certificate of Deposit ("CD")*	Maturity Date (if applicable)	
*Transfer <input type="checkbox"/> Immediately <input type="checkbox"/> At Maturity		

### Section 3

#### INVESTMENT CHOICES

##### New\* Thomas White Funds IRA Account

- Thomas White American Opportunities Fund
- Thomas White Emerging Markets Fund
- Thomas White International Fund

##### Existing Thomas White Funds IRA Account

- Thomas White American Opportunities Fund
- Thomas White Emerging Markets Fund
- Thomas White International Fund

- IRA
- Coverdell Education Savings Account
- SEP-IRA
- SIMPLE
- Roth IRA

	Account Number
<input type="checkbox"/> IRA	
<input type="checkbox"/> Coverdell Education Savings Account	
<input type="checkbox"/> SEP-IRA	
<input type="checkbox"/> SIMPLE	
<input type="checkbox"/> Roth IRA	

\*If you are opening a new account, this form must be accompanied by a completed IRA Application.

Section 4

**CONVERSION OF TRADITIONAL IRA TO ROTH IRA**

Check here if you are distributing assets from a Traditional IRA with the intention of establishing a Conversion Roth IRA.

Section 5

**SIGNATURE**  
(Exactly as registered)

To current Custodian:

*If you do not make an indication of the amount of assets to be transferred, all assets in the identified account will be transferred by default.*

Please consider this your authority to sell  all of my assets  \$ \_\_\_\_\_ of my assets in the account identified in Section 2 above and prepare a check to Thomas White Funds. It is my intention to transfer these assets to the Fund checked in Section 3, for which U.S. Bancorp Fund Services acts as Custodian.

Please send the check representing the assets, along with a copy of this form to:

Thomas White Funds  
c/o (please insert name of Investor listed in Section 1)  
U.S. Bancorp Fund Services, LLC  
P.O. Box 701  
Milwaukee, WI 53201-0701

I certify that I have received and read the prospectus for the Fund into which I am transferring my IRA. Thank you for your prompt handling.

\_\_\_\_\_  
Signature / / Date

\_\_\_\_\_  
Signature Guarantee (If required by current Custodian)

Section 7

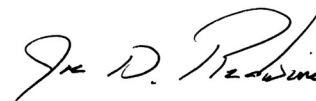
**SPECIAL NOTE**

I am over 70½ and the minimum required distribution for the current calendar year has been withheld from the assets being transferred.

Section 8

**ACCEPTANCE**

Custodian Authorization: U.S. Bancorp Fund Services hereby accepts its appointment as Custodian of the above IRA account and upon receipt of assets, will deposit such assets in the Thomas White Fund indicated in Section 3 on behalf of the Depositor authorizing this transfer or direct rollover.



Joe Redwine  
U.S. Bancorp Fund Services