THOMAS WHITE FUNDS
Capturing Value Worldwide℠

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 ☐ Immediately ☐ At Maturity

Section 3

INVESTMENT CHOICES

New* Thomas White Funds IRA Account	**Existing Thomas White Funds IRA Account**	
☐ Thomas White American Opportunities Fund	☐ Thomas White American Opportunities Fund	
☐ Thomas White Emerging Markets Fund	☐ Thomas White Emerging Markets Fund	
☐ Thomas White International Fund	☐ Thomas White International Fund	
		Account Number
☐ IRA	☐ IRA	________
☐ Coverdell Education Savings Account	☐ Coverdell Education Savings Account	________
☐ SEP-IRA	☐ SEP-IRA	________
☐ SIMPLE	☐ SIMPLE	________
☐ Roth IRA	☐ 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)

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.

To current Custodian:

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 D. Redwine

Joe Redwine
U.S. Bancorp Fund Services
