

Account Transfer Form

Use this form to authorize the transfer of assets into your JP Morgan account. Complete one form for each account being transferred.

1. Information About Your Account. The registration of the account being transferred must match your JP Morgan account (i.e., IRA to IRA).

JP MORGAN ACCOUNT

JP Morgan Account Number (If available)	0352 JPMCC Clearing No.
Account Holder Name/Account Title	
Primary Social Security or Tax Identification Number	
Joint Account Owner (if applicable)	Second SS # (if applic.)

ACCOUNT BEING TRANSFERRED

Account Number	Broker Clearing No.
Title of Account You are Transferring (as shown on your statement)	
Name of Firm currently holding your account	
Address of Firm	

2. Transfer Instructions: Complete section A or B and, if applicable, section C. A copy of your most recent statement is required.

A. <input type="checkbox"/> Transfer from a Brokerage Firm only. Select one: <input type="checkbox"/> Transfer all assets in kind <input type="checkbox"/> Partial transfer (Complete section C below.)			
B. <input type="checkbox"/> Transfer from a Bank, Mutual Fund, or Credit Union only <input type="checkbox"/> Transfer all assets in kind <input type="checkbox"/> Partial transfer (Complete section C below.) <input type="checkbox"/> Liquidate all assets and transfer as cash (Additional steps may be required, contact your Financial Professional.) <input type="checkbox"/> Transfer proceeds from Certificates of Deposit AT MATURITY (Submit no earlier than 30 days prior to maturity.) <input type="checkbox"/> Liquidate Certificates of Deposit IMMEDIATELY. I am aware of and acknowledge the penalty I will incur from an early withdrawal.			
C. <input type="checkbox"/> Partial Transfer Instructions: Transfer only a portion of my account, as detailed below (continue on a separate sheet if needed).			
Quantity	Symbol or CUSIP #	Description of Asset	Cash Balance (Indicate credit or debit)
			\$

To the Delivering Firm named above:

If this account is a qualified retirement account, I have amended the applicable plan so that it names as successor custodian the below listed trustee. Unless otherwise indicated in the instructions above, please transfer all assets in my account to J.P. Morgan Clearing Corp. I understand that to the extent any assets in my account are not readily transferable with or without penalties, such assets may not be transferred within the timeframes required by NYSE Rule 412 or similar rule of the FINRA or other designated examining authority.

Unless otherwise indicated in the instructions below, I authorize you to liquidate any non-transferable proprietary money market fund assets that are part of my account and transfer the resulting credit balance to the successor custodian. I authorize you to deduct any outstanding fees due you from the credit balance in my account. If my account does not contain a credit balance, or if the credit balance in the account is insufficient to satisfy any outstanding fees due to you, I authorize you to liquidate the assets in my account to the extent necessary to satisfy that obligation. If certificates or other instruments in my account are in your physical possession, I instruct you to transfer them in good deliverable form, including affixing any necessary tax waivers, to enable the successor custodian to transfer them in its name for the purpose of sale, when and as directed by me. I understand that upon receiving a copy of this transfer instruction, you will cancel all open orders for my account on your books.

I affirm that I have destroyed or returned to you credit/debit cards and/or unused checks issued to me in connection with my securities account.

I understand that I will be contacted with respect to the disposition of any assets in my securities account that are non-transferable.

Age 70-1/2 Restrictions – The following restrictions apply to a retirement account transfer.

If I am over 70-1/2, I attest that none of the amount to be transferred will include the required minimum distribution for the current year pursuant to Section 401(a)(9) of the Internal Revenue Code. If necessary, instruct your present custodian prior to effecting this transfer to either: **1) Pay your required minimum distribution to you now OR 2) Retain that amount there for distribution to you later.**

3. Owner Authorization and Agreement to Terms. By signing below, I (we) acknowledge reading and agree to the above terms and conditions.

Owner/Custodian/Trustee Signature	Joint Owner Signature (if any)/Plan Administrator/Trustee	Date (Required)
X	X	
Print Name	Title/Role	Print Name

Letter of Acceptance

Subject to the by-laws and rules of the N.S.C.C.

J.P. MORGAN CLEARING CORP. ("JPMCC") will accept the above captioned account as SUCCESSOR CUSTODIAN/TRUSTEE. JPMCC does not accept and will not act as Custodian/ Trustee of and for any assets and/or positions which are not actually transferred to JPMCC and JPMCC specifically does not approve any notation on the books and records of any entity, including but not limited to any mutual fund company, that indicates, implies and/or states that JPMCC is the custodian/trustee of any assets held away from JPMCC.

Successor Custodian Signature (JPMCC Receiving Custodian Completes)	Date	Contact: J.P. Morgan Clearing Corp. ACAT Dept. Telephone No. 347-643-2942
Name of Registered Representative	Branch	R.R. No. Telephone No.

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<input type="radio"/> C = Cash/Mgn	<input type="radio"/> 4K = 40	<input type="radio"/> QP = Qual/PS/Pen/Pls	<input type="radio"/> Broker Change Only
<input type="radio"/> CO = Corporate	<input type="radio"/> CU = Custodian (UGMA)	<input type="radio"/> DR = Direct Roller	<input type="radio"/> IR = IRA
<input type="radio"/> TR = Trust	<input type="radio"/> JT = Joint	<input type="radio"/> EI = Educational	<input type="radio"/> RI = Roth IRA

Doc Code 447 Non-ACAT SN = Single