

# AMUNDI US SIMPLE IRA TRANSFER OF ASSETS FORM

Use this form to request a transfer of SIMPLE IRA assets held with another custodian to your Amundi US SIMPLE IRA. Based on your instructions, BNY Mellon Investment Servicing Trust Company will initiate the transfer for you. If you reached or passed the age Required Minimum Distributions begin (age 70 ½ if you were born on or prior to June 30, 1949 and age 72 if you were born on or after July 1, 1949), you are responsible for distributing any required minimum distribution amounts from your current SIMPLE IRA in advance of the transfer. Please remember the transfer of assets can only occur between SIMPLE IRA accounts. Incomplete information will result in delays in processing your request.

If you need assistance completing this form, please contact Shareholder Services at 1-800-622-0176.

**NOTE: We require the original form in order to process your request. Faxed copies will not be accepted.**

## **PARTICIPANT INFORMATION**

Name: \_\_\_\_\_ Cell Phone: (    ) \_\_\_\_\_

Address: \_\_\_\_\_ Alternate Telephone: (    ) \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

## **INVESTMENT INSTRUCTIONS**

Complete items A and B.

A.  I am opening a new SIMPLE IRA and have attached the required SIMPLE IRA Application.

Deposit the proceeds into my existing SIMPLE IRA. Account Number: \_\_\_\_\_

B. Invest as follows:

Fund Name (including class of shares):

_____	Dollar Amount \$	or	Percentage	%
_____	Dollar Amount \$	or	Percentage	%
_____	Dollar Amount \$	or	Percentage	%

Must equal 100%

## **CURRENT CUSTODIAN AND ACCOUNT INFORMATION**

Please attach your most recent statement, if possible. Note: your current custodian may require a Medallion Signature Guarantee to process your transfer request. Please see the Participant Authorization section for an explanation of the Medallion Signature Guarantee.

**Name of current custodian:** \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Contact name: \_\_\_\_\_ Telephone number: (    ) \_\_\_\_\_

### **1) Investment to transfer:**

Account number: \_\_\_\_\_ Share class: \_\_\_\_\_ CUSIP number: \_\_\_\_\_

Liquidate Entire Account  Partial Dollar Amount \$ \_\_\_\_\_ or # of Shares \_\_\_\_\_  Transfer In-Kind

For Certificate of Deposits:  Immediately\*  At Maturity Date \_\_\_\_\_

**2) Investment to transfer:**

Account number: \_\_\_\_\_ Share class: \_\_\_\_\_ CUSIP number: \_\_\_\_\_

Liquidate Entire Account  Partial Dollar Amount \$ \_\_\_\_\_ or # of Shares \_\_\_\_\_  Transfer In-Kind

For Certificate of Deposits:  Immediately\*  At Maturity Date \_\_\_\_\_

**\*Note:** If you wish to have certificates of deposit transferred immediately and they have not matured, you may incur a redemption penalty. We cannot accept requests to transfer assets from certificates of deposit more than 60 days before their maturity.

**PARTICIPANT AUTHORIZATION**

I authorize the transfer of assets as noted above to my Amundi US SIMPLE IRA and authorize my current custodian, Amundi US, Pioneer Funds and BNY Mellon Investment Servicing Trust Company to process this request on my behalf. I understand it is my responsibility to insure the prompt transfer of assets by the current custodian. I have read and understand all information on this form and hereby provide the applicable authorization.

**Participant's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Mail to the following:**

**First Class Mail:**  
Pioneer Funds  
P.O. Box 9897  
Providence, RI 02940

**Overnight Mail:**  
Pioneer Funds  
4400 Computer Drive  
Westborough, MA 01581  
1-800-622-0176

Medallion Signature Guarantee Stamp and Signature (If required by your current custodian or transfer agent): An eligible guarantor is a domestic bank or trust company, securities broker/dealer, clearing agency or savings association that participates in a medallion program recognized by the Securities Transfer Agents Association. The three recognized medallion programs are the Securities Transfer Agents Medallion Program (known as STAMP), Stock Exchanges Medallion Program (SEMP), and the Medallion Signature Program (MSP). A notarization from a notary public is NOT an acceptable substitute for a signature guarantee.

Medallion Signature Guarantee Stamp
-------------------------------------