

# ROTH IRA ACCOUNT TRANSFER

For Internal Use
PM
A/C#

Instructions: Use this form to transfer cash from an existing account to Johnson Mutual Funds Trust. If you are opening a new account, the completed Account Application must accompany this Account Transfer form. Please be aware that your present institution may require additional documentation including a signature guarantee by a commercial bank or New York Stock Exchange member firm. Please complete all the information requested below. Johnson Mutual Funds Trust will process your transfer and the Custodian will send you notification when the cash has been received and invested.

## 1. PARTICIPANT INFORMATION:

NAME	TAX ID OR SSN	
ADDRESS		
CITY	STATE	ZIP
PRIMARY PHONE NUMBER	SECONDARY PHONE NUMBER	DATE OF BIRTH

## 2. NAME, ADDRESS, AND PHONE NUMBER OF RESIGNING TRUSTEE:

NAME OF ORGANIZATION	ATTENTION	
ADDRESS		
CITY	STATE	ZIP
PRIMARY PHONE NUMBER	ACCOUNT OR POLICY NUMBER	

### TYPE OF ACCOUNT TO BE TRANSFERRED:

- Traditional IRA     IRA Rollover     Roth IRA     SEP-IRA     Other  
 SIMPLE IRA     Inherited IRA     Inherited Roth IRA

## 3. RECENT STATEMENT:

Is a copy of your resigning trustee account statement attached?

- YES     NO

## 4. FUND SELECTION:

Please indicate your fund selection below:

- Initial Investment (see accompanying IRA Application)  
**OR**  
**\$ Amount or % Per Fund**
- |  |       |
|--|-------|
| <input type="checkbox"/> Johnson Equity Income Fund    | _____ |
| <input type="checkbox"/> Johnson Opportunity Fund      | _____ |
| <input type="checkbox"/> Johnson International Fund    | _____ |
| <input type="checkbox"/> Johnson Fixed Income Fund     | _____ |
| <input type="checkbox"/> Johnson Municipal Income Fund | _____ |

**5. AUTHORIZATION FOR TRANSFER:**

**Note: If you are 70½ or older this year, the required minimum distribution MUST be taken before the transfer is made.**

Please check one:

- Liquidate all full and fractional shares (estimated value of transfer \$ \_\_\_\_\_) of the account(s) indicated in Section 2 and transfer the proceeds payable to "Johnson Mutual Funds"  **immediately** OR  **at maturity**.  
**Close the account.** Send any subsequent dividends or interest that post to the above listed address as specified.
- Liquidate part (\$ \_\_\_\_\_) of the account(s) indicated in Section 2 and transfer the proceeds payable to "Johnson Mutual Funds"  **immediately** OR  **at maturity**. **Do not close account.**

Details of Liquidation:

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**6. AUTHORIZATION FOR TRANSFER:**

TO RESIGNING TRUSTEE OR CUSTODIAN:

INVESTOR SIGNATURE	PRINTED NAME	DATE
SIGNATURE GUARANTEE (IF NEEDED)		

**7. NEW CUSTODIAN:**

TO BE COMPLETED BY NEW CUSTODIAN:

We have been requested to send you a letter of acceptance in order to transfer the assets of the above-mentioned account for deposit to the Johnson Mutual Funds Trust. To ensure proper crediting, contact the Funds for trustee-to-trustee delivery instructions.

This is to be executed as a trustee-to-trustee transfer so as not to put the plan participant in actual or constructive receipt of all or any part of the transferred assets.

TRUST OFFICER'S SIGNATURE	PRINTED NAME	DATE
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