

IRA Transfer Form

(If this is for a new IRA, an IRA Packet must accompany this form.)

Regular Mail:

Bridges Investment Fund c/o U.S. Bank Global Fund Services PO Box 219252 Kansas City, MO 64121-9252 **Overnight Mail:**

Bridges Investment Fund c/o U.S. Bank Global Fund Services 801 Pennsylvania Ave Suite 219252 Kansas City, MO 64105-1307

There may be penalties for withdrawing certain investments before their maturity (i.e., certificates of deposit or annuities). Please contact your current custodian or plan administrator prior to submitting this form to determine the applicable time frames and penalties, if any, or if you need a signature guarantee in section 6 to order this transfer. U.S. Bank Global Fund Services will initiate your request upon receipt of this form.

1 Investor Information
FIRST NAME M.I. LAST NAME SOCIAL SECURITY NUMBER
ADDRESS CITY / STATE / ZIP
DAYTIME PHONE NUMBER EVENING PHONE NUMBER
2 Instructions to Current IRA Custodian or Plan Administrator
Please include a copy of your current account statement.
CURRENT CUSTODIAN OR PLAN ADMINISTRATOR FUND NAME, IF APPLICABLE
ACCOUNT NUMBER CONTACT PERSON CONTACT NUMBER
STREET ADDRESS CITY / STATE / ZIP
Consider this your authorization to redeem my investment and transfer my Traditional IRA, SEP IRA, Roth IRA, or Inherited IRA, or to directly rollover my qualified retirement plan as directed below:
□ All Assets OR □ \$ or \ %
Please process this request:*
☐ Immediately OR ☐ At Maturity
(MONTH / DAY / YEAR) * If no option is selected, please transfer all assets immediately.
Instructions for Delivery - indicate how you want your current Custodian/Trustee to deliver the assets to U.S. Bank Global Fund Services.
 ☐ Wire - Funds available immediately upon receipt, your Custodian/Trustee may charge a fee for this service. ☐ Check - Funds may not be available for 12-15 Business days.
☐ First Class Mail ☐ Overnight Delivery - Take the fee from my account ☐ Overnight Delivery via Third Party – Charge the fee to my FedEx or UPS account
☐ FedEx ☐ UPS Account/Billing Number

Send the check representing the assets payable to "The Bridges Investment Fund FBO [Shareholder's Name]" along with a copy of this form to the address at the top of this page.

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3 Processing Instructions and Fund Selection

Processing Instructions	- indicate how you war	nt us to initi	ate your transfer/rollover w	ith your current custodian.	
☐ Standard Processing	Service - No charge, t	transfer for	n will be sent via First Clas	s Mail.	
☐ Overnight Delivery - S	\$15.00 fee, select one	of the option	ns below; if no selection is	made we will use First Class	Mail.
 We will overnight you 	ur transfer form to your	current Cu	stodian/Trustee.		
 Physical address mu 	ist be provided on page	e one, cann	ot overnight to a PO Box.		
Use the attached	check made payable t	o U.S. Banl	k Global Fund Services		
☐ Charge the \$15.0	0 fee to my third party	billing prov	ided below		
☐ FedEx	☐ UPS Account/Bil	ling Numbe	er		
Type of account being tr	ansferred/rolled-over	·•			
☐ Pension	☐ Profit Sharing Plan	า	☐ 401(k)	☐ 403(b)	☐ Roth 401(k)
☐ Roth 403(b)	☐ Traditional IRA		☐ SEP IRA	☐ SIMPLE IRA	☐ Roth IRA
☐ Inherited IRA	☐ Other:				
Original Roth IRA funding	year (if applicable):				
Original SIMPLE IRA fund	ing date (if applicable):				
Fund Selection					
<u> </u>		•	o process this transfer if a ey are different from those	new account is being establis indicated below.	shed. The Fund(s)
	NEW	EXISTING A	ACCOUNT # (IF APPLICABLE)	AMOUNT	%
☐ Bridges Investment F	und 1470 🗖	u [OR
4 Required Minimu	um Distribution (RMD) Ag	je Information		
Check one of the following					
☐ I am under the RMD agOR	e and do not turn RMD	Age at any	time during this calendar y	rear.	
☐ I am RMD age or older			<u> </u>	r or rollover. I further unders	tand that there

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5 Conversion of Traditional IRA to Roth IRA - Optional
☐ I am converting assets from a Traditional IRA to a Roth IRA. Upon receiving the assets from my current Custodian, I instruct the Fund's transfer agent to invest the proceeds into a new or existing Roth IRA account, as indicated in Instructions to Current IRA Custodian or Plan Administrator section. I understand this may be a taxable event and that I am solely responsible for all tax consequences of this conversion. The Fund's transfer agent will only process the conversion if you check the box above.
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6 Signature and Certification Required by the Internal Revenue Service
I certify that I have established an IRA with the Bridges Investment Fund, of which U.S. Bank, N.A., is the Custodian. I agree to contact my present Custodian from whom I am transferring to determine if specific documentation or a signature guarantee is required. I understand that I am responsible for determining my eligibility for all transfers or direct rollovers. I agree to hold the Custodian harmless against any and all situations arising from an ineligible transfer or direct rollover. I acknowledge that the Custodian or its agent cannot provide legal advice and I agree to consult with my own tax professional for advice. I authorize U.S. Bank Global Fund Services, to act on my behalf in contacting the current custodian or plan administrator to facilitate the transfer of assets.
x
SIGNATURE OF OWNER DATE (MM/DD/YYYY)

IMPORTANT: Please contact your current Custodian to determine if a signature guarantee is required.

SIGNATURE GUARANTEE* (FOR TRANSFERS FROM ANOTHER CUSTODIAN)

If required, a signature guarantee or a signature validation may be obtained from an officer of a bank, savings association, credit union, a member firm of a domestic stock exchange, or the Financial Industry Regulatory Authority, that is an eligible guarantor institution. A notary public from a financial institution is able to provide an acceptable guarantee. The notary public's business card or a signed letter from the notary public on the financial institution's letterhead must accompany the form.

We suggest you contact your financial institution to verify the documentation required to obtain a signature guarantee or notary stamp for your specific situation.

7 Acceptance / Custodian Authorization

U.S. Bank, N.A., hereby accepts its appointment as Custodian of the above IRA and upon receipt of assets, will deposit such assets in a Bridges Investment Fund IRA on behalf of the Depositor authorizing this transfer or direct rollover.

U.S. BANK, N.A.

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Gregory Farley

Senior Vice President-Mutual Fund Operations

For additional information please call toll-free 1-866-934-4700 or visit us on the web at www.bridgesfund.com.