

# Traditional IRA Transfer of Assets/Direct Rollover Form

GuideStone Funds  
P.O. Box 9834  
Providence, RI 02940-8034

GuideStone Trust Services, an affiliate of GuideStone Financial Resources  
of the Southern Baptist Convention, serves as IRA custodian.  
For assistance, please call **1-888-98-GUIDE** (1-888-984-8433).

Use this form to request a transfer of assets or direct rollover from another financial institution to GuideStone Funds. This form may only be used for one transfer request per institution. Separate forms must be completed for any additional transfers. Attach a copy of a current statement if possible. Do not use this form to convert an IRA to a Roth IRA.

**Special required minimum distribution notice:** If you will attain age 70½ during the calendar year or are older and are required to take a minimum distribution from your employer-sponsored retirement plan or IRA, you must either take that distribution prior to transferring your plan or IRA assets to GuideStone Funds or you may leave that distribution amount in the existing plan or IRA and withdraw it prior to the distribution deadline (generally December 31).

## 1. PARTICIPANT INFORMATION (THE FORM MUST BE COMPLETED IN INK)

Participant first name: \_\_\_\_\_ MI: \_\_\_\_\_ Last: \_\_\_\_\_  
Social Security number: \_\_\_\_\_ Birth date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Home telephone: (\_\_\_\_) \_\_\_\_\_ Daytime telephone: (\_\_\_\_) \_\_\_\_\_  
Mailing address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_  
Physical address (if different from above): \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_  
Email address (optional): \_\_\_\_\_

## 2. TRANSFER INSTRUCTIONS (COMPLETE A, B AND C BELOW)

- A. **Contribution source:**  Transfer of assets (like plans - for example, IRA to IRA; unlimited transfers in a 365-day period)  
 Direct Rollover from:  
 403(b) plan  Qualified plan (401(k) plan)  IRA  457(b) governmental plan  
 Other eligible retirement plan \_\_\_\_\_
- B. **Place these funds:**  In a new IRA (I have attached the *Traditional IRA Application*)  
 In my existing IRA Account number: \_\_\_\_\_  
 Into the following funds (**the initial investment must be at least \$1,000 per fund**).  
Fund: \_\_\_\_\_ %  
Fund: \_\_\_\_\_ %  
Fund: \_\_\_\_\_ %

### C. Account to be transferred to GuideStone Funds:

Current custodian: \_\_\_\_\_ Telephone number: (\_\_\_\_) \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

### Please liquidate the following investments and transfer proceeds to my GuideStone Funds IRA:

Account number: \_\_\_\_\_ Fund: \_\_\_\_\_  Entire account  Partial \_\_\_\_\_ \$ or %  
Account number: \_\_\_\_\_ Fund: \_\_\_\_\_  Entire account  Partial \_\_\_\_\_ \$ or %  
For Certificates of Deposit (CD):  Immediately or  Upon maturity Maturity date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Continued on other side

If your CD is to be transferred to GuideStone Funds upon maturity, we must receive this form at least 30 days, but not more than 60 days, prior to the maturity date. If the maturity date is more than 60 days away, the transfer form will be returned to you. Your current IRA custodian may impose a premature withdrawal penalty if you choose to liquidate your CD prior to maturity. If you are transferring more than one CD and the maturity dates are more than one month apart, please complete separate forms.

Instructions to resigning custodian/transfer agent:

Please liquidate the participant's account and mail check payable to:

First Class Mail:	Overnight Mail:
GuideStone Funds, FBO <u>participant name</u>	GuideStone Funds, FBO <u>participant name</u>
Traditional IRA	Traditional IRA
P.O. Box 9834	101 Sabin Street
Providence, RI 02940-8034	Pawtucket, RI 02860-1427

**3. PARTICIPANT SIGNATURE**

I authorize the transfer of assets or direct rollover as noted above to my GuideStone Funds IRA and authorize GuideStone Funds and GuideStone Trust Services to process this request on my behalf. I understand it is my responsibility to assure the prompt transfer of assets by the current custodian. I have read and understand all information in the instructions and hereby provide the applicable direct rollover certification.

I understand that if I am age 70½ or will attain age 70½ in this calendar year, I must satisfy any minimum distribution requirements prior to a transfer of assets or leave the required distribution amount in the existing account and withdraw it prior to the distribution deadline (generally December 31).

Participant signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Medallion signature guarantee: Please call the custodian or the other institution from which you are transferring to see if a signature guarantee or other documentation is required.

Medallion signature guarantee — Medallion stamp\*: \_\_\_\_\_

\*The medallion signature guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations which participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a Signature Guarantee. The medallion signature guarantee stamp must include the words "SIGNATURE GUARANTEED, MEDALLION GUARANTEED" and otherwise comply with the medallion program requirements. Please check your fund prospectus or with your fund as to whether a signature guarantee is required.

**TO BE COMPLETED BY GUIDESTONE TRUST SERVICES AS CUSTODIAN**

GuideStone Trust Services accepts its appointment as custodian of the above referenced IRA and has established an IRA under the Internal Revenue Code section 408(a) for IRAs under the participant's name in GuideStone Funds. GuideStone Funds and GuideStone Trust Services, as custodian, cannot accept assets other than cash. Upon receipt of check, the proceeds will be credited to the named participant's account.

Accepted by GuideStone Trust Services as custodian for GuideStone Funds IRAs.

Signature of GuideStone Trust Services authorized representative: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Broker/Dealer: 00005 — GuideStone Financial Services