



TRADITIONAL/SEP IRA TRANSFER FORM

Please select a Fund(s), complete this information and return to the Perkins Discovery Fund with a completed fund application.

Perkins Discovery Fund

IRA TRANSFER LETTER: Transfer Request can be sent regular Mail or Over Night service to:

The Perkins Discovery Fund
c/o Commonwealth Fund Services, Inc.
8730 Stony Point Parkway, Suite 205
Richmond, VA 23235
855-505-VEST

If you are already a shareholder in the Perkins Discovery Fund you do not need to complete another new account application.

Existing Perkins Discovery Fund Account Number (if applicable): _____

Date: _____
Month/Date/Year

To: _____
Present Custodian/Trustee/Insurance Company

Address of Present Custodian/Trustee/Insurance Company:

Street City State Zip

Account Number: _____

Social Security or Tax ID Number _____

Gentlemen/Ladies: I have executed the Individual Retirement Account Application with the Perkins Discovery Fund.
By this letter I am requesting that you:

- Liquidate the assets in the IRA plan which I have with you and remit the entire proceeds to the Perkins Discovery Fund applied for in cash, to be invested in my IRA plan with the Perkins Discovery Fund.
- Liquidate \$ _____ from the IRA plan which I have with you and remit that amount to the Perkins Discovery Fund applied for in cash, to be invested in my IRA plan with Perkins Discovery Fund.
- Transfer in kind

Affix signature guarantee here:

Account Owner (Please Print)

Signed Date

THIS SECTION TO BE COMPLETED BY COMMONWEALTH FUND SERVICES, INC

Acceptance Agreement by UMB Bank, N.A. The custodian of the Individual Retirement Account is UMB Bank, N.A. It has delegated to Commonwealth Fund Services, Inc. certain ministerial duties, including the execution of the plans and the acceptance of contributions. Pursuant to that delegation of authority, Commonwealth Fund Services, Inc. has, on behalf of the custodian, executed the IRA plan of the individual described above and accepts the appointment of the custodian under the Custodian Account Agreement of the World Funds Trust.

Please make the transfer by check payable to:

The Perkins Discovery Fund FBO: _____

Account Number: _____ By: _____

The Perkins Discovery Fund is a series of the World Funds Trust