



INDIVIDUAL RETIREMENT TRANSFER OF ASSETS FORM

Please complete this form only if you are transferring assets directly to a new or existing Centerstone Funds IRA, converting from a Traditional IRA to a Roth IRA, transferring from an existing Roth IRA, rolling over a Roth IRA, or you are requesting a direct rollover from an employer sponsored plan. Please complete a separate form for each IRA you wish to transfer or for each qualified plan you are directly rolling over. If you are establishing a new Centerstone Funds IRA, this form must be preceded or accompanied by a completed Individual Retirement Custodial Account Adoption Agreement. Transfers may take 3 to 5 weeks to complete after your paperwork is received in good order.

For Additional Copies or Assistance

If you need additional copies of this form, or would like assistance completing it, please call the Centerstone Funds at 1-877-314-9006 or go to www.centerstoneinv.com

Instructions

- If you are establishing a new Centerstone Funds IRA, this form must be preceded or accompanied by a completed Individual Retirement Account Adoption Agreement.

- Mail this Transfer Form to:

Centerstone Funds
c/o Gemini Fund Services, LLC
PO Box 541150
Omaha, NE 68154

Retain a copy for your records.

1. ACCOUNT REGISTRATION

Please provide your primary legal address, in addition to any mailing address (if different).

Owner's Name (First, Middle, Last)

Social Security Number

Street Address

Date of Birth

City, State, Zip

Daytime Telephone

Email Address

Evening Telephone

- This is a new IRA account with the Centerstone Funds. I have completed and enclosed an IRA Application with this transfer form.
- This is an existing IRA. Please apply transfer proceeds to my account number: _____

2. CURRENT IRA CUSTODIAN/TRUSTEE INFORMATION

Name of Current Custodian or Trustee

Account Name

Street Address

Account Number

City, State, Zip

Telephone Number of Current Custodian

Please attach a copy of the most recent statement for this account.

5. CERTIFICATIONS AND SIGNATURES

I certify to the current IRA custodian or trustee that I have established a successor Individual Retirement Custodial Account meeting the requirements of the Internal Revenue Code to which assets will be transferred, and I certify to Constellation Trust Company that the account from which assets are being transferred meets the requirements of the Internal Revenue Code and that the transfer satisfies the requirements for nontaxable transaction. **The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup withholding.**

IRA account Owner's Signature

Date

*A signature guarantee can be obtained from a bank, broker-dealer, a credit union, a national securities exchange, savings association or other financial intermediaries that are members of an Approved Medallion Guarantee Program. A signature by a Notary Public is not acceptable as a signature guarantee.

Medallion Signature Guarantee* (if required):

Some Custodians/Trustees require a signature guarantee to transfer assets. Please check with your Custodian/Trustee to see if they require a medallion signature guarantee. Failure to obtain a required signature guarantee may result in a delay in the transfer of assets.

6. CUSTODIAN ACCEPTANCE

Constellation Trust Company agrees to accept the transfer of the above amount for deposit in a Constellation Trust Company Individual Retirement Custodial Account for the individual set forth in Section 1 of this form, and requests the transfer of assets as indicated above.

Accepted by: _____ Date: _____

7. TRANSFER INSTRUCTIONS

Make check payable to:

Centerstone Funds

FBO: _____

Account Number: _____

Mail to: Centerstone Funds

c/o Gemini Fund Services, LLC
PO Box 541150
Omaha, NE 68154

Or

Via Overnight Delivery
17605 Wright Street, Suite 2
Omaha, NE 68130

TO CONTACT US:

By Telephone

Toll-free 1-877-314-9006

Internet

www.centerstoneinv.com

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