



Use this form to make a gift or transfer shares to an individual or a non-profit organization. Do not use this form for an IRA account.

To transfer your account, we need to know how it is currently registered. Complete a separate form for each account being transferred.

Please complete this entire Gift or Transfer of Shares Form, sign it and mail it and additional documentation, if applicable, to Artisan Partners Funds. Failure to complete all required sections will result in processing delays. Please retain a copy of the completed form for your records.

We encourage you to consult with your legal counsel and tax advisor in completing this form regarding the tax consequences and tax requirements of gifting or transferring shares. A Medallion Signature Guarantee is necessary to transfer shares.

### For Regular Mail Delivery

Artisan Partners Funds  
P.O. Box 219322  
Kansas City, MO 64121-9322

### For Overnight Delivery

Artisan Partners Funds  
801 Pennsylvania Ave, Suite 219322  
Kansas City, MO 64105-1307

**Questions?** Call 800.344.1770 or visit [www.artisanpartners.com](http://www.artisanpartners.com)

## 1. Account Registration (Please type or print clearly)

Fund Name		Artisan Fund/Account Number	
Registered Owner's Name (First, Middle, Last)		Social Security Number/Tax Identification Number	Date of Birth (MM-DD-YYYY)
Street Address			
City	State	Zip	
(     )			
Phone	Email		

## 2. Transfer Instructions

Fund Name		Account Number
Transfer the amount indicated below: (check one box only)		
<input type="checkbox"/> <b>Transfer percentage of account:</b> _____ % (if total account, enter 100%)		
<input type="checkbox"/> <b>Transfer dollars:</b> \$ _____		
<input type="checkbox"/> <b>Transfer shares:</b> # _____		
Transfer to: (check one box only)		
<input type="checkbox"/> <b>New Artisan Partners Funds account</b> (Please have new owner complete a new account application.)		
<input type="checkbox"/> <b>Existing account</b> (Shares must be transferred to an account within the same Fund.)		
<input type="checkbox"/> <b>Redeem</b> (Please have inheritor complete a Redemption Form and Form W-9)		
Fund Name	Account Number	Amount (\$ or #) or Percent (%)
Additional Fund Name	Account Number	Amount (\$ or #) or Percent (%)

3. Reason for Transfer

As part of the Emergency Economic Stabilization Act of 2008, mutual fund companies will be required to report cost basis information to shareholders and to the Internal Revenue Service (IRS) on mutual fund shares acquired and subsequently redeemed after January 1, 2012.

To ensure accurate cost basis reporting, indicate the type of transfer requested and provide details where applicable.

☐ Re-registration

☐ Death (inheritance) \_\_\_\_\_  
Date of Death (MM-DD-YYYY) Required

☐ Gift<sup>1</sup> \_\_\_\_\_  
Date of Gift (MM-DD-YYYY) Required

☐ Minor has reached the Age of Majority

☐ Alternate Valuation Date<sup>2</sup> \_\_\_\_\_  
(MM-DD-YYYY)  
**OR:**  
Alternate Value<sup>2</sup> \$ \_\_\_\_\_ (optional)

If the recipient’s existing account or new account will use the Average Cost account method, they must sign below indicting acceptance of the shares valued at fair market value of the date of gift or settlement date if the shares should be transferred at a loss.

**Fair Market Value Acceptance** \_\_\_\_\_  
Signature of Recipient

If a reason is not provided this transfer will be defaulted a transfer due to gift.

<sup>1</sup>If you are transferring shares of a closed Artisan Partners Fund as a gift please note that additional investments from the recipient are generally not permitted unless they are otherwise eligible to open an account in a closed Fund. For closed Fund eligibility criteria, please refer to the “Who is Eligible to Invest in a Closed Fund?” section of the prospectus.

<sup>2</sup>There is a special rule under the estate tax that allows the executor (the person in charge of the estate) to elect a different valuation date in certain cases. If the estate qualifies for this election, and the executor makes the election, the valuation date is six months after the date of death. The principal reason for making this election is to reduce the amount of estate tax that must be paid. But the election also has an effect on income tax, because it means you will now use the later date to determine your basis.

4. Cost Basis Information

The cost basis method that is currently on your account will be utilized to deplete the shares for this transaction unless you provide specific share lots below or choose another cost basis method. Should you wish to change your cost basis election, you can do so by completing a new Shareholder Options Form or contacting a Shareholder Services representative for instructions at 800.344.1770.

Date of Purchase (MM-DD-YYYY)	Number of Shares
Date of Purchase (MM-DD-YYYY)	Number of Shares
Date of Purchase (MM-DD-YYYY)	Number of Shares

If you have shares transferred that were purchased prior to January 1, 2012 (uncovered shares), we may be able to provide you an average cost for these shares upon depletion. This information will be provided to you on your Cost Basis Statement and you may choose to use the information for your taxes.

5. Signature

I have requested that the instructions requested on this form be made to my account. I indemnify Artisan Partners Funds, its transfer agent, and any officers, directors, employees, or agents of these entities for following the instructions I indicate on this form. I understand that once this request is received and processed the transactions can not be reversed.

I agree that Artisan Partners and their affiliates, agents, employees, officers, and directors will not be liable for any loss, claim, or expense for action or inaction based on any instructions, including any given under the telephone and internet transaction privileges, that are reasonably believed to be genuine provided that reasonable security procedures have been followed.

I affirm that there are no known disputes or competing claims that would affect the transfer of ownership I have requested. In consideration for processing this request, I agree to indemnify Artisan Partners Funds, their transfer agent, and their respective agents, officers, trustees, directors or employees with respect to any direct liabilities, losses, or reasonable expenses arising from compliance with this request.

If you have any questions, please visit [www.artisanpartners.com](http://www.artisanpartners.com) or call 800.344.1770 to speak with a customer service representative.

Owner's Signature (Name as it appears in Section 1)

Date (MM-DD-YYYY)

Joint Owner's Signature (Name as it appears in Section 1)

Date (MM-DD-YYYY)

A Medallion Signature Guarantee may be obtained from a bank, credit union, or brokerage firm (called the guarantor). A Notary Public cannot provide a Medallion Signature Guarantee. **If the surety bond amount of the medallion guarantee is less than the amount of your transaction(s), your request will be rejected. Please note that a Notary Public stamp or seal is different from a Medallion Signature Guarantee and is not acceptable.**

Name of Bank or Firm

Authorized Signature and Stamp

Date (MM-DD-YYYY)

