



A conversion is a reportable movement of IRA assets (e.g., traditional, inherited, spousal, SEP IRA) to a Roth IRA. Use this form to convert your Artisan Partners Funds IRA. Do not use this form for an IRA Recharacterization.

Important Information About Converting

Read your Artisan Partners Funds—UMB Bank, n.a. Individual Retirement Account Disclosure Statement and Custodial Agreement, which contain information for converting your Artisan Partners Funds IRA.

- If you are 72 or over (70 1/2 for those born before July 1, 1949), your Required Minimum Distribution (RMD) is NOT eligible for conversion. The RMD for the calendar year must be taken prior to converting to a Roth IRA.
- You are responsible for maintaining records of your conversions, recharacterizations, and annual contributions in order to properly complete your federal tax forms.
- Effective January 1, 2018, pursuant to the Tax Cuts and Jobs Act (Pub. L. No. 115-97), a conversion from a traditional IRA, SEP or SIMPLE to a Roth IRA cannot be recharacterized. The new law also prohibits recharacterizing amounts rolled over to a Roth IRA from other retirement plans, such as 401(k) or 403(b) plans.

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

If you are converting shares to an existing Artisan Partners Funds IRA:

- Account owner must complete Parts 1-6 of the IRA Conversion Form.

If you are converting shares to a new Artisan Partners Funds IRA:

- Account owner must complete Parts 1-6 of the IRA Conversion Form. Enclose a completed IRA Application.
- Each new Fund account must meet the stated minimum investment requirement.

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

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

2. Type of IRA to Convert

Check the type of IRA you are converting:

- ☐ Traditional IRA ☐ Rollover IRA ☐ SEP IRA ☐ Inherited Spousal IRA

3. Conversion Instructions

Please specify the account(s) from which you want to convert. For a full conversion, indicate 100%.

[illegible]

4. Investment Instructions

You may invest your converted assets in an existing Artisan Partners Fund Roth IRA(s), or you may establish a new Roth IRA for these assets.

1) Existing Artisan Partners Funds IRA

☐ Invest the assets from this conversion into my existing Artisan Partners Funds Roth IRA(s) listed below:

[illegible]

4. Investment Instructions (continued)

2) New Artisan Partners Funds Roth IRA

☐ Invest the assets from this conversion into a new Artisan Partners Funds Roth IRA. Enclose a completed IRA Application. Each new Fund account must meet the stated minimum investment requirement. Funds noted with an asterisk (*) are closed to most new investors. For more information, refer to the “Who is Eligible to Invest in a Closed Fund” section of the Fund’s prospectus.

Artisan Partners Funds	Select Share Class ¹			Amount	or	Percentage
	Investor	Advisor	Institutional			
Developing World	<input type="checkbox"/> 2463	<input type="checkbox"/> 2464	<input type="checkbox"/> 2465	\$		%
Emerging Markets Debt Opportunities	<input type="checkbox"/> 2483	<input type="checkbox"/> 2484	<input type="checkbox"/> 2485	\$		%
Floating Rate	<input type="checkbox"/> 2480	<input type="checkbox"/> 2482	<input type="checkbox"/> 2481	\$		%
Focus	<input type="checkbox"/> 2470	<input type="checkbox"/> 2477	<input type="checkbox"/> 2478	\$		%
Global Discovery	<input type="checkbox"/> 2475	<input type="checkbox"/> 2431	<input type="checkbox"/> 2476	\$		%
Global Equity	<input type="checkbox"/> 1676	<input type="checkbox"/> 2479	<input type="checkbox"/> 2466	\$		%
Global Opportunities	<input type="checkbox"/> 1675	<input type="checkbox"/> 2456	<input type="checkbox"/> 1677	\$		%
Global Unconstrained	<input type="checkbox"/> 2486	<input type="checkbox"/> 2487	<input type="checkbox"/> 2488	\$		%
Global Value	<input type="checkbox"/> 1673	<input type="checkbox"/> 2457	<input type="checkbox"/> 1679	\$		%
High Income*	<input type="checkbox"/> 2454	<input type="checkbox"/> 2455	<input type="checkbox"/> 2468	\$		%
International	<input type="checkbox"/> 661	<input type="checkbox"/> 2458	<input type="checkbox"/> 662	\$		%
International Explorer		<input type="checkbox"/> 2493	<input type="checkbox"/> 2494	\$		%
International Small-Mid*	<input type="checkbox"/> 1465	<input type="checkbox"/> 2427	<input type="checkbox"/> 2467	\$		%
International Value*	<input type="checkbox"/> 1466	<input type="checkbox"/> 2459	<input type="checkbox"/> 1672	\$		%
Mid Cap	<input type="checkbox"/> 962	<input type="checkbox"/> 2460	<input type="checkbox"/> 1333	\$		%
Mid Cap Value	<input type="checkbox"/> 1464	<input type="checkbox"/> 2461	<input type="checkbox"/> 2450	\$		%
Select Equity	<input type="checkbox"/> 2429	<input type="checkbox"/> 2428	<input type="checkbox"/> 2430	\$		%
Small Cap	<input type="checkbox"/> 660	<input type="checkbox"/> 2469	<input type="checkbox"/> 2452	\$		%
Sustainable Emerging Markets	<input type="checkbox"/> 1674	<input type="checkbox"/> 2495	<input type="checkbox"/> 1671	\$		%
Value	<input type="checkbox"/> 1670	<input type="checkbox"/> 2462	<input type="checkbox"/> 1678	\$		%
Value Income	<input type="checkbox"/> 2489	<input type="checkbox"/> 2490	<input type="checkbox"/> 2491	\$		%
Sub-total				\$		100%
Acceptance fee of \$5 per Fund account ²				\$		
TOTAL AMOUNT				\$		100%

¹Investor Shares minimum investment: \$1,000 per Fund. (No minimum investment is required in the Investor Shares if you select an Automatic Investment Plan—Section 9). Advisor Shares minimum investment: \$250,000 per Fund. Institutional Shares minimum investment: \$1,000,000 per Fund. If you do not meet the minimum investment threshold for the share class you selected, your investment will be placed in the appropriate share class with a lower minimum investment threshold. ²If you do not include the \$5 per Fund account acceptance fee in your check or wire, it will be deducted from your investment.

Custodian Fees
Acceptance Fee: \$5 per Fund account. Annual Maintenance Fee: \$15 per Fund account (maximum \$30 per social security number). Termination, Rollover or Transfer of Account to successor Custodian: \$10 per Fund account.

5. Income Tax Withholding and Verification

Withholding Instructions. Under IRS rules, a conversion to a Roth IRA is treated for income tax purposes as a distribution of taxable amounts in the other IRA. IRS rules also require the custodian to withhold 10% of the amount transferred for federal income taxes unless no withholding has been elected. See IRS Publication 505, “Tax Withholding and Estimated Tax” for more information. State tax withholding may also apply if federal income tax is withheld.

Consult with your tax advisor or refer to your states tax laws for more information. Caution: Withholding income taxes from the amount converted (instead of paying applicable income taxes from another source) may adversely impact the expected financial benefits of transferring from another IRA to a Roth IRA (consult your financial adviser if you have a question).

Please check one box:

☐ Do **NOT** withhold federal income tax ☐ Withhold _____% federal tax income

If no election is made, the default withholding rate of 10% will be applied.

6. Certification and Signature

I certify the accuracy of the information provided on the IRA Conversion Form and authorize Artisan Partners Funds to convert an Artisan Partners Funds IRA. I accept full responsibility for complying with all IRS requirements with respect to my Artisan Partners Funds—UMB Bank, n.a. IRA. I hereby indemnify Artisan Partners, Artisan Partners Funds, SS&C Global Investor & Distribution Solutions, Inc., and UMB Bank, n.a., and any affiliate and/or any of their directors, trustees, employees, and agents if I fail to meet such IRS requirements.

By making a withholding election and signing the IRA Conversion Form, I assert that I have read and understand the current IRS Form W-4R and its instructions.

Signature of IRA Owner

Date (MM-DD-YYYY)

NOTE: Conversions are limited to the calendar year and cannot apply to a prior year. The conversion must be completed by December 31 to be reportable for the tax year.

**Withholding Certificate for Nonperiodic Payments and
Eligible Rollover Distributions**

Give Form W-4R to the payer of your retirement payments.

2025

1a First name and middle initial	Last name	1b Social security number
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Address

City or town, state, and ZIP code

Your withholding rate is determined by the type of payment you will receive.

- For nonperiodic payments, the default withholding rate is 10%. You can choose to have a different rate by entering a rate between 0% and 100% on line 2. Generally, you can't choose less than 10% for payments to be delivered outside the United States and its territories.

- For an eligible rollover distribution, the default withholding rate is 20%. You can choose a rate greater than 20% by entering the rate on line 2. You may not choose a rate less than 20%.

See page 2 for more information.

2	Complete this line if you would like a rate of withholding that is different from the default withholding rate. See the instructions on page 2 and the Marginal Rate Tables below for additional information. Enter the rate as a whole number (no decimals)	2	%
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**Sign
Here**

Your signature (This form is not valid unless you sign it.)

Date

General Instructions

Section references are to the Internal Revenue Code.

Future developments. For the latest information about any future developments related to Form W-4R, such as legislation enacted after it was published, go to www.irs.gov/FormW4R.

Purpose of form. Complete Form W-4R to have payers withhold the correct amount of federal income tax from your nonperiodic payment or eligible rollover distribution from an employer retirement plan, annuity (including a commercial annuity), or individual retirement arrangement (IRA). See page 2 for the rules and options that are available for each type of payment. Don't use Form W-4R for periodic payments (payments made in installments at regular

intervals over a period of more than 1 year) from these plans or arrangements. Instead, use Form W-4P, Withholding Certificate for Periodic Pension or Annuity Payments. For more information on withholding, see Pub. 505, Tax Withholding and Estimated Tax.

Caution: If you have too little tax withheld, you will generally owe tax when you file your tax return and may owe a penalty unless you make timely payments of estimated tax. If too much tax is withheld, you will generally be due a refund when you file your tax return. Your withholding choice (or an election not to have withholding on a nonperiodic payment) will generally apply to any future payment from the same plan or IRA. Submit a new Form W-4R if you want to change your election.

2025 Marginal Rate Tables

You may use these tables to help you select the appropriate withholding rate for this payment or distribution. Add your income from all sources and use the column that matches your filing status to find the corresponding rate of withholding. See page 2 for more information on how to use this table.

Single or Married filing separately		Married filing jointly or Qualifying surviving spouse		Head of household	
Total income over—	Tax rate for every dollar more	Total income over—	Tax rate for every dollar more	Total income over—	Tax rate for every dollar more
\$0	0%	\$0	0%	\$0	0%
15,000	10%	30,000	10%	22,500	10%
26,925	12%	53,850	12%	39,500	12%
63,475	22%	126,950	22%	87,350	22%
118,350	24%	236,700	24%	125,850	24%
212,300	32%	424,600	32%	219,800	32%
265,525	35%	531,050	35%	273,000	35%
641,350*	37%	781,600	37%	648,850	37%

*If married filing separately, use \$390,800 instead for this 37% rate.

General Instructions (*continued*)

Nonperiodic payments—10% withholding. Your payer must withhold at a default 10% rate from the taxable amount of nonperiodic payments **unless** you enter a different rate on line 2. Distributions from an IRA that are payable on demand are treated as nonperiodic payments. Note that the default rate of withholding may not be appropriate for your tax situation. You may choose to have no federal income tax withheld by entering “-0-” on line 2. See the specific instructions below for more information. Generally, you are not permitted to elect to have federal income tax withheld at a rate of less than 10% (including “-0-”) on any payments to be delivered outside the United States and its territories.

Note: If you don’t give Form W-4R to your payer, you don’t provide an SSN, or the IRS notifies the payer that you gave an incorrect SSN, then the payer must withhold 10% of the payment for federal income tax and can’t honor requests to have a lower (or no) amount withheld. Generally, for payments that began before 2025, your current withholding election (or your default rate) remains in effect unless you submit a Form W-4R.

Eligible rollover distributions—20% withholding.

Distributions you receive from qualified retirement plans (for example, 401(k) plans and section 457(b) plans maintained by a governmental employer) or tax-sheltered annuities that are eligible to be rolled over to an IRA or qualified plan are subject to a 20% default rate of withholding on the taxable amount of the distribution. You can’t choose withholding at a rate of less than 20% (including “-0-”). Note that the default rate of withholding may be too low for your tax situation. You may choose to enter a rate higher than 20% on line 2. Don’t give Form W-4R to your payer unless you want more than 20% withheld.

Note that the following payments are **not** eligible rollover distributions for purposes of these withholding rules:

- Qualifying “hardship” distributions;
- Distributions required by federal law, such as required minimum distributions;
- Distributions from a pension-linked emergency savings account;
- Eligible distributions to a domestic abuse victim;
- Qualified disaster recovery distributions;
- Qualified birth or adoption distributions; and
- Emergency personal expense distributions.

See Pub. 505 for details. See also *Nonperiodic payments—10% withholding* above.

Payments to nonresident aliens and foreign estates. Do not use Form W-4R. See Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities, and Pub. 519, U.S. Tax Guide for Aliens, for more information.

Tax relief for victims of terrorist attacks. If your disability payments for injuries incurred as a direct result of a terrorist attack are not taxable, enter “-0-” on line 2. See Pub. 3920, Tax Relief for Victims of Terrorist Attacks, for more details.

Specific Instructions

Line 1b

For an estate, enter the estate’s employer identification number (EIN) in the area reserved for “Social security number.”

Line 2

More withholding. If you want more than the default rate withheld from your payment, you may enter a higher rate on line 2.

Less withholding (nonperiodic payments only). If permitted, you may enter a lower rate on line 2 (including “-0-”) if you want less than the 10% default rate withheld from your payment. If you have already paid, or plan to pay, your tax on this payment through other withholding or estimated tax payments, you may want to enter “-0-”.

Suggestion for determining withholding. Consider using the Marginal Rate Tables on page 1 to help you select the appropriate withholding rate for this payment or distribution. The tables are most accurate if the appropriate amount of tax on all other sources of income, deductions, and credits has been paid through other withholding or estimated tax payments. If the appropriate amount of tax on those sources of income has not been paid through other withholding or estimated tax payments, you can pay that tax through withholding on this payment by entering a rate that is greater than the rate in the Marginal Rate Tables.

The marginal tax rate is the rate of tax on each additional dollar of income you receive above a particular amount of income. You can use the table for your filing status as a guide to find a rate of withholding for amounts above the total income level in the table.

To determine the appropriate rate of withholding from the table, do the following. Step 1: Find the rate that corresponds with your total income not including the payment. Step 2: Add your total income and the taxable amount of the payment and find the corresponding rate.

If these two rates are the same, enter that rate on line 2. (See *Example 1* below.)

If the two rates differ, multiply (a) the amount in the lower rate bracket by the rate for that bracket, and (b) the amount in the higher rate bracket by the rate for that bracket. Add these two numbers; this is the expected tax for this payment. To get the rate to have withheld, divide this amount by the taxable amount of the payment. Round up to the next whole number and enter that rate on line 2. (See *Example 2* below.)

If you prefer a simpler approach (but one that may lead to overwithholding), find the rate that corresponds to your total income including the payment and enter that rate on line 2.

Examples. Assume the following facts for *Examples 1* and *2*. Your filing status is single. You expect the taxable amount of your payment to be \$20,000. Appropriate amounts have been withheld for all other sources of income and any deductions or credits.

Example 1. You expect your total income to be \$65,000 without the payment. Step 1: Because your total income without the payment, \$65,000, is greater than \$63,475 but less than \$118,350, the corresponding rate is 22%. Step 2: Because your total income with the payment, \$85,000, is greater than \$63,475 but less than \$118,350, the corresponding rate is 22%. Because these two rates are the same, enter “22” on line 2.

Example 2. You expect your total income to be \$61,000 without the payment. Step 1: Because your total income without the payment, \$61,000, is greater than \$26,925 but less than \$63,475, the corresponding rate is 12%. Step 2: Because your total income with the payment, \$81,000, is

greater than \$63,475 but less than \$118,350, the corresponding rate is 22%. The two rates differ. \$2,475 of the \$20,000 payment is in the lower bracket (\$63,475 less your total income of \$61,000 without the payment), and \$17,525 is in the higher bracket (\$20,000 less the \$2,475 that is in the lower bracket). Multiply \$2,475 by 12% to get \$297. Multiply \$17,525 by 22% to get \$3,856. The sum of these two amounts is \$4,153. This is the estimated tax on your payment. This amount corresponds to 21% of the \$20,000 payment (\$4,153 divided by \$20,000). Enter "21" on line 2.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to provide this information only if you want to (a) request additional federal income tax withholding from your nonperiodic payment(s) or eligible rollover distribution(s); (b) choose not to have federal income tax withheld from your nonperiodic payment(s), when permitted; or (c) change a previous Form W-4R (or a previous Form W-4P that you completed with respect to your nonperiodic payments or eligible rollover distributions). To do any of the aforementioned, you are required by sections 3405(e) and 6109 and their regulations to provide the information requested on this form. Failure to provide this information may result in inaccurate withholding on your payment(s).

Failure to provide a properly completed form will result in your payment(s) being subject to the default rate; providing fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.