



Use this form to transfer Traditional IRA, Roth IRA or SEP-IRA assets, or assets from an employer-sponsored qualified retirement plan, 403(b) arrangement or qualified governmental 457 plan, to an Artisan Partners Funds IRA from your current custodian. Upon receipt of this form, we will contact your current custodian to arrange the transfer.

If you are directly rolling over a distribution from an employer-sponsored retirement plan, please do not use this form, simply check the correct box on the Artisan Partners Funds IRA Application.

Please complete this entire IRA Transfer 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.

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

It is your responsibility to assure prompt transfer of the assets from the current custodian/trustee or employer to UMB Bank, n.a. If you do not receive a confirmation statement detailing the transfer within 30 days, please call your current custodian/trustee or employer. It is also your responsibility to keep track of after-tax contributions and non-deductible contributions. The IRS generally, with certain exceptions, only allows one rollover in any twelve month period, regardless of the number of IRAs you own. It is your responsibility to ensure that you do not exceed the number and type of allowable rollovers in a given twelve month period.

We encourage you to consult with your legal counsel and/or tax advisor in completing this form regarding the tax consequences and tax requirements of transferring an IRA.

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

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

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

*You must be a US resident with a US mailing address. If your mailing address is a post office box, you must also provide a US residential address to invest in Artisan Partners Funds.

2. Artisan Partners Funds Investment

Check one of the following boxes:

- ☐ I am opening a new Artisan Partners Funds IRA and am attaching my completed IRA Application.
- ☐ I already own an Artisan Partners Funds Traditional IRA into which I am making this transfer:
(List any additional accounts on a separate sheet of paper.)

Artisan Partners Fund Name	Account Number	Amount (\$), Percent (%) or Number of Shares
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Artisan Partners Fund Name	Account Number	Amount (\$), Percent (%) or Number of Shares
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- ☐ I already own an Artisan Partners Funds Roth IRA into which I am making this transfer:
(List any additional accounts on a separate sheet of paper.)

Artisan Partners Fund Name	Account Number	Amount (\$), Percent (%) or Number of Shares
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Artisan Partners Fund Name	Account Number	Amount (\$), Percent (%) or Number of Shares
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If you are transferring funds from a Traditional IRA, SEP-IRA, or qualified employer plan, that you inherited as the beneficiary of the original IRA owner or plan participant, do not transfer those funds into an existing IRA account that you already own unless you are the surviving spouse of the original IRA owner or plan participant and you wish to have the funds treated as part of your own IRA for purposes of the minimum distribution rules. Otherwise, you should open a new IRA (even if you already have an Artisan Partners Funds IRA), and check the box for “Inherited IRA” on the application form.

Custodian Acceptance

UMB Bank, n.a. agrees to accept transfer of the above amount for deposit to the Artisan Partners Funds’ IRA, and requests the liquidation and transfer of assets as indicated below.

See attached Letter of Acceptance for the signature of an authorized officer of the custodial agent.

Send redemption proceeds by check made payable to:

Artisan Partners Funds IRA
FBO (SHAREHOLDER’S NAME)

Mail to the following address:

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

3. Transfer Instructions

List the assets you are transferring to your Artisan Partners Funds IRA. We will contact your current custodian to arrange the transfer.

If applicable, please contact your current custodian to satisfy this year's required minimum distribution before your transfer is made (not applicable to transfers from a Roth IRA).

A) Account Information

Owner's Name (First, Middle, Last)

Account Number at Current Custodian

Name of the Mutual Fund, Brokerage Firm or Bank in which your IRA is Invested

Amount (\$) or Percent (%)

Type of Account (check one)

- ☐ Traditional IRA
- ☐ Roth IRA
- ☐ SEP-IRA
- ☐ Rollover IRA (check this only if you are transferring an IRA that contains solely the assets of a previous rollover from an employer-sponsored retirement plan)
- ☐ Qualified employer plan (other than a Roth account)
- ☐ Roth account or qualified employer plan
- ☐ 403(b) plan
- ☐ Governmental 457 plan

B) Current Custodian

Current Custodian's Name

Mailing Address

City

State

Zip

C) Transfer Type

Transfer Assets in Cash

☐ Liquidate all or ☐ \$ _____ or ☐ _____ % of assets in the above-referenced account and transfer the proceeds to UMB Bank, n.a., custodian of my Artisan Partners Funds IRA. The check should be made payable to Artisan Partners Funds.

OR

Transfer in Kind

My assets currently include Artisan Partners Funds shares to be transferred in kind.

☐ All or ☐ \$ _____ or ☐ _____ % of assets in the above-referenced account.

4. Signature

I certify to the present IRA or plan custodian or trustee that I have established a successor Individual Retirement Custodial Account meeting the requirements of Internal Revenue Code Section 408(a), 408(k), 408(p) or 408A (as the case may be) to which assets will be transferred, and further certify to UMB Bank, n.a. that the IRA or plan from which assets are being transferred meets the requirements of Internal Revenue Code Section 401(a), 403(b), 408(a), 408(k), 408(p), 408A or 457(b) and (e) (1) (A) (as the case may be). Please liquidate the amount listed in Section 3 above and forward to Artisan Partners Funds.

I acknowledge that I have sole responsibility for my investment choices and that I have received and read a current prospectus for each Fund I select.

I understand that the requirements for a valid transfer to a Traditional IRA, SEP-IRA or Roth IRA are complex and that I have the responsibility for complying with all requirements and for the tax implications of any such transfer.

Signature (Name as it appears in Section 1)

Date (MM-DD-YYYY)

Note: If applicable your minimum required distribution for the current year is not eligible for transfer. (Not applicable to transfers from a Roth IRA).

Medallion Signature Guarantee

Your current custodian may require a Medallion Signature Guarantee in order to process the transfer. Please check with your custodian and obtain a Medallion Signature Guarantee if necessary. 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. **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 Providing Medallion Signature Guarantee

Authorized Signature and Stamp

Date (MM-DD-YYYY)

