



**WINTERGREEN
FUND**

IRA Asset Transfer Form

For assistance with this form, please call 1-888-468-6473.
Visit www.wintergreenfund.com to open your account online.

Return your completed application to:
Wintergreen Fund, Inc.
P. O. Box 701
Milwaukee, WI 53201-0701

Our overnight mail address is:
Wintergreen Fund, Inc.
615 East Michigan Street, 3rd Floor
Milwaukee, WI 53202

THE USA PATRIOT ACT

To help the government fight the funding of terrorism and money laundering activities, Federal Law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account.

What this means for you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. You may also be asked to show other identifying documentation.

Your full name, date of birth, Social Security number, and permanent street address must be provided and will be verified as required by the Patriot Act. If these fields are not completed, this application will be returned.

IMPORTANT SHAREHOLDER INFORMATION

Please complete this form to authorize Wintergreen Fund, Inc. to initiate an asset transfer of your existing IRA from another financial institution.

- If you are opening a new IRA account at Wintergreen Fund, you must also complete and sign a Wintergreen Fund IRA application.
- Transfers between traditional IRAs and Roth IRAs are not permissible.
- A separate IRA Asset Transfer Form must be completed for each institution assets are being transferred from.
- If you will reach age 70-1/2 during this calendar year, or are older, you will be required to take a minimum distribution from your retirement plan. You can either take that distribution before transferring the assets to us, or leave the amount of the required minimum distribution (RMD) in the existing retirement plan and withdraw it prior to the distribution deadline, generally December 31.
- Asset transfers are completed in an average of three to four weeks from the date Wintergreen Fund, Inc. receives your request.

There may be penalties for withdrawing certain investments before their maturity (i.e., certificates of deposit or annuities). Please contact your current custodian or plan administrator prior to submitting this form to determine the applicable time frames and penalties, if any, and/or if you need a signature guarantee in Section 6 to order this transfer. U.S. Bancorp Fund Services, LLC will initiate your request upon receipt of this form.

1. ACCOUNT OWNER INFORMATION

PERMANENT STREET ADDRESS (P.O. Box is not acceptable.)

Owner's Name		Social Security Number	
Street Address and Apartment			
City	State	Zip Code	

(If mailing address is a post office box, a street address is also required by the USA Patriot Act. APO and FPO addresses will be accepted.)

Daytime Telephone Number	Evening Telephone Number
Account Number	Birth Date (Month, Day, Year)

MAILING ADDRESS *(if different from Permanent Address)*

Street Address or P.O. Box Number		
City	State	Zip Code

2. CURRENT CUSTODIAN INFORMATION

Attach a copy of a current statement from your existing account to this IRA Asset Transfer Form. Complete information will help avoid delays with your transfer.

Name of Current IRA Custodian		
Street Address and Apartment or P.O. Box Number		
City	State	Zip Code
Contact Person <i>(if any)</i>	Telephone Number	

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3. INSTRUCTIONS TO CURRENT IRA CUSTODIAN

All assets indicated below must be held with the custodian named in Section 2.

Please transfer the assets indicated below to Wintergreen Fund, Inc. (Please note: Your entire account will be liquidated and transferred unless you specify a dollar amount below.)

Name of Investment	Account Number	All OR Dollar Amount (For partial transfer only)
Name of Investment	Account Number	All OR Dollar Amount (For partial transfer only)

4. ASSET TRANSFER OR CONVERSION

- Open a new Wintergreen Fund IRA Account (IRA Application Needed)
- Invest the specified proceeds in my existing Wintergreen Fund account. Account # _____

Type of Plan you have now:

- Traditional IRA
- Rollover IRA
- Roth IRA _____ (original start date)
- SEP-IRA
- Simple IRA _____ (original start date)
- Coverdell ESA
- Qualified Plan 401(k), 403(b), or Profit Sharing
- Qualified Plan Roth 401(k), Roth 403 (b)

Type of Plan you are transferring to:

- Traditional IRA
- Rollover IRA
- Roth IRA _____ (original start date)
- SEP-IRA
- Simple IRA _____ (original start date)
- Coverdell ESA

5. AGE 70½ INFORMATION

Does not apply to Roth IRAs

Check one of the following:

I am under the age of 70½ and do not turn 70½ at anytime during the calendar year

OR

I am age 70½ or older and understand that no part of my required minimum distribution is eligible for transfer or rollover. I further understand that there may be significant tax penalties if a transfer or rollover of my required distribution occurs.

6. SIGNATURE AND CERTIFICATION

I certify that I have established an IRA with Wintergreen Fund, Inc., of which U.S. Bank, NA, is the Custodian. I agree to contact my present Custodian from whom I am transferring to determine if specific documentation or a signature guarantee is required. I understand that I am responsible for determining my eligibility for all transfers or direct rollovers. I agree to hold the Custodian harmless against any and all situations arising from an ineligible transfer or direct rollover. I acknowledge that the Custodian or its agent cannot provide legal advice and I agree to consult with my own tax professional for advice.

I authorize U.S. Bancorp Fund Services, LLC, to act on my behalf in contacting the current custodian or plan administrator to facilitate the transfer of assets.

Signature of Owner (or Guardian if IRA Owner is a Minor)	Date
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Signature Guarantee* (For Transfers From Another Custodian)

*A signature guarantee may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, saving associations, credit unions, and brokerage firms. The words "SIGNATURE GUARANTEED" must be stamped or typed near each signature being guaranteed. The guarantee must appear with the printed name, title, and signature of an officer and the name of the guarantor institution. Please note that a Notary Public Seal or Stamp is not acceptable.

7. ACCEPTANCE / CUSTODIAN AUTHORIZATION

U.S. Bank, NA, hereby accepts its appointment as Custodian of the above IRA account and upon receipt of assets, will deposit such assets in a Wintergreen Fund, Inc. IRA on behalf of the Depositor authorizing this transfer or direct rollover.

U.S. BANK, NA



8. FINAL CHECKLIST

Before you mail, have you:

- Completed an IRA Account Application if the transfer or direct rollover is going to a new account?
- Included documents from your current custodian or plan administrator, if required?
- Signed this form in Section 6?
- Consulted with your current custodian about any applicable fees or penalties and whether or not you need a signature guarantee?