



# Kirr, Marbach Partners Funds

## IRA Transfer Form

Mail to: Kirr, Marbach Partners Funds  
 c/o U.S. Bancorp Mutual Fund Services, LLC  
 PO Box 701  
 Milwaukee, WI 53201-0701

Overnight Express Mail To: Kirr, Marbach Partners Funds  
 c/o U.S. Bancorp Mutual Fund Services, LLC  
 615 E. Michigan St., 3<sup>rd</sup> Floor  
 Milwaukee, WI 53202-5207

For fund information, prices and literature, **1-800-870-8039**.

### Instructions

Use this form when transferring funds from an *existing* IRA to a Kirr, Marbach Partners Funds IRA. If you are establishing a new account, you must also complete a Kirr, Marbach Partners Funds IRA Application.

### INVESTORS ARE REMINDED THAT:

- Your current custodian/trustee may require that you obtain a signature guarantee to process this transfer.
- A signature guarantee may be obtained by a domestic commercial bank, trust company, a member firm of a national securities exchange, or a savings & loan association. A signature guarantee by a notary public will NOT be accepted.
- Transfer paperwork will be processed as of the day it is received.

### A. Investor Information

NAME	SOCIAL SECURITY #
ADDRESS	
CITY/STATE/ZIP	
( ) DAYTIME PHONE NUMBER	( ) EVENING PHONE NUMBER

### B. Please Transfer My IRA From:

NAME OF CURRENT CUSTODIAN (BANK, SAVINGS AND LOAN, MUTUAL FUND, ETC.)	
ADDRESS	
CITY/STATE/ZIP	
ACCOUNT NUMBER OR CERTIFICATE OF DEPOSIT (CD)*	MATURITY DATE (IF APPLICABLE)

\*Transfer  immediately  at maturity

### C. Investment

<input type="checkbox"/> Open a new* Kirr, Marbach Partners Funds Account. <small>*If you are opening a new account, this form must be accompanied by a completed IRA Application.</small>	<input type="checkbox"/> Invest in my existing Kirr, Marbach Partners Funds Account.
<input type="checkbox"/> IRA <input type="checkbox"/> Rollover IRA <input type="checkbox"/> SEP-IRA <input type="checkbox"/> SIMPLE <input type="checkbox"/> Roth IRA <input type="checkbox"/> **Conversion Roth IRA Year established _____ <small>(Year in which traditional IRA was converted to a Roth IRA.)</small>	<input type="checkbox"/> IRA <input type="checkbox"/> Rollover IRA <input type="checkbox"/> SEP-IRA <input type="checkbox"/> SIMPLE <input type="checkbox"/> Roth IRA <input type="checkbox"/> **Conversion Roth IRA _____ _____ _____ _____

\*\*Only available to individuals with single or joint Adjusted Gross Income of \$100,000 or less.

	Account # (if applicable)	Investment Amount or Percentage
<input type="checkbox"/> Kirr, Marbach Partners Value Fund		\$ _____ %
<input type="checkbox"/> Kirr, Marbach FA Retail Treasury Obligations Fund		\$ _____ %

See reverse side of form

**D. Conversion of Traditional IRA to Roth IRA**

Check here if you are distributing assets from a Traditional IRA with the intention of establishing a Conversion Roth IRA.

**E. Signature**

(Exactly as Registered)

To current Custodian:

Please consider this your authority to sell  all of my assets  \$\_\_\_\_\_ of my assets in the account identified in Section B above and prepare a check to Kirr, Marbach Partners Funds. It is my intention to transfer these assets to the above-named fund, for which U.S. Bancorp Fund Services, LLC acts as Custodian.

Please send the check representing the assets, along with a copy of this form to:

Kirr, Marbach Partners Funds  
FBO [shareholder name]  
[account number]  
c/o U.S. Bancorp Fund Services, LLC  
P.O. Box 701  
Milwaukee, WI 53201-0701

I certify that I have received and read the prospectus for each Fund into which I am transferring my IRA. Thank you for your prompt handling.

\_\_\_\_\_  
YOUR SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE GUARANTEE (IF REQUIRED BY CURRENT CUSTODIAN)

**F. Special Note**

I am over 70 ½ and the minimum required distribution for the current calendar year has been withheld from the assets being transferred.

**G. Acceptance**

Custodian Authorization: U.S. Bank N.A. hereby accepts its appointment as Custodian of the above IRA account and upon receipt of assets, will deposit such assets in a Kirr, Marbach Partners Funds IRA on behalf of the Depositor authorizing this transfer or direct rollover.

**U.S. Bank N.A.**