IRA TRANSFER FORM

Use this form when redeeming and transferring funds from an existing IRA to an Giant 5 IRA. Please call 800-528-3780 for Fund information, literature, prices and Giant 5 account information**. Visit Giant 5 on the World Wide Web at www.Giant5.com.** You must complete Sections 1 through 6 below and return this IRA transfer form along with your **IRA application** (if this is a new account).For assistance in completing this application please call 888.544.2685

Please return this form by regular mail:

Giant 5 Funds
P.O. Box 2175
Milwaukee, WI 53201-2174

Send Overnight deliveries to:

Giant 5 Funds
803 W Michigan Street St A
Milwaukee, WI 53233

Please check with your current trustee/custodian to determine if a Medallion signature guarantee is required to process this transfer. You will receive a confirmation when the transfer has been completed

Transfer coming from:

Name of Current Custodian (Bank, Mutual Fund, etc.)

Address

City, State, Zip

.***Note for investors 70½ or older***: you may take your required minimum distribution from any one or all of your IRA accounts. If you have not satisfied the minimum distribution requirements you may be required to take a minimum distribution from your present IRA before rolling over your retirement assets to an Giant 5 IRA. Consult your tax adviser regarding your distribution requirements.

1. INVESTOR INFORMATION

Social Security Number | Date of Birth

Name (First, Middle, Last)

Street Address

City, State, Zip Code

( ) | ( )
Daytime Telephone | Evening Telephone

E-mail Address | Fax Number

2. PLEASE TRANSFER MY IRA

Name of Current Trustee/Custodian (Bank, Mutual Fund, etc.)

Telephone Number

Account Number or Certificate of Deposit

$
Approximate Value | Maturity Date (if applicable)

If you hold a certificate of deposit*, transfer:

☐ Immediately ☐ At maturity

*Penalties may be assessed by your current trustee/custodian for early withdrawal.

Please attach a copy of your current account statement(s).

Type of plan you now have:

☐ Traditional IRA
☐ Rollover IRA
☐ Roth IRA
☐ SEP-IRA
☐ Other Employer Sponsored Plan:

Plan Type

☐ Other Roth Employer Sponsored Plan:

Plan Type

Type of plan you are transferring to:

☐ Traditional IRA
☐ Rollover IRA
☐ Roth IRA
☐ SEP-IRA

Are these assets inherited coming from a deceased participant account or beneficiary IRA?

☐ **Yes** ☐ **No**

Note: If these are inherited assets coming from an employer plan and you are a nonspouse beneficiary, please complete a **Nonspouse Beneficiary Direct Rollover from an Employer's Plan Form**. Call Shareholder Services at 888.544.2685 to receive the form.

3. YOUR FUND SELECTION(S)

☐ **Invest the proceeds in my existing Giant 5 Fund IRA**

_____
Account Number

☐ **Invest the proceeds in my new Giant 5 Fund IRA.**
If you are opening a new account, a completed and signed IRA application must accompany this form.

Invest the assets of the IRA transfer as follows:

☐ Giant 5 Total Investment System Fund (380)

$_____ or _____%

☐ Giant 5 Total Index System Fund (381)

$_____ or _____%

Please note that the initial investment minimum is $2,500. The subsequent investment minimum is $100. If you are enrolled in the automatic investment plan, the subsequent investment minimum is $100. To enroll in the automatic investment plan, please see the new account application.

4. WITHHOLDING ELECTION

IRA regulations require that your current Custodian withhold Federal income taxes at the rate of 10% from the converted IRA amount unless you elect **not** to have withholding apply. If you do not elect to have Federal income tax withheld, you are liable for payment of Federal income tax on the taxable portion of distributions. You may also be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate. Please select from the following options:

☐ I do not want federal income tax withheld on distributions from this account.

☐ I want federal income tax withheld in the amount of 10% from distributions from this account.

☐ I want federal income tax of _____% (must be greater than 10%) withheld from distributions from this account.

Consult your tax adviser regarding the tax consequences for withholding amounts from your distribution for Federal tax payment. Amount withheld may only be refunded by the Internal Revenue Service. The amount withheld may be subject to income tax and a 10% penalty**.**

5. SIGNATURE

I understand that conversions from a Traditional IRA to a Roth IRA will be treated as a distribution and may be considered ordinary income for tax purposes. I have been advised to consult a tax professional and assume full responsibility for this conversion transaction and will not hold the Giant 5 Mutual Funds, and their agents (including, but not limited to, the Giant 5 Mutual Funds Custodian) liable for any adverse consequences that may result.

I understand that the resigning custodian will remit any income tax which has been withheld to the Internal Revenue Service on my behalf. I also understand that if I recharacterize, amounts previously withheld may only be refunded by the Internal Revenue Service. Amounts withheld may be subject to a 10% early withdrawal penalty in addition to income tax.

To current trustee/custodian:
Please consider this your authority to sell

$_____ or _____%

of my assets in the account identified in Section 2 and prepare a check payable to:

Giant 5 Funds:
FBO_____
PO Box 2175
Milwaukee, WI 53201-2175

If you prefer to wire funds directly, please call 888.544.2685 for further instruction.

It is my intention to transfer these assets to an IRA account with the above named Fund(s) for which UMB Bank, n.a. acts as Custodian. I certify that I have received and read the Prospectus(es) for the Fund(s) into which I am transferring my IRA.

_____
IRA Owner Signature * Date

** If the owner of the IRA account is a minor, the responsible person designated on the current IRA account needs to sign this form.*

Federal law requires us to obtain, verify and record information that identifies each person who opens an account. Therefore, when you open an account, you will be asked for your name, address, date of birth and other information that will allow us to identify you. You may also be asked to show your driver's license or other identifying documents.

Medallion Signature Guarantee (if required)**

*****Please check with your current trustee/custodian to determine if a Medallion signature guarantee is required to process this transfer.***

A Medallion signature guarantee may be obtained from any eligible guarantor institution. These institutions include U.S. banks, savings associations, credit unions and brokerage firms participating in the Securities Transfer Association Medallion Program. Approved programs currently include STAMP, SEMP and MSP. **A notary public stamp or seal is not acceptable.**

6. ACCEPTANCE

This portion is to be completed by UMB Bank, n.a., Custodian for Giant 5 Mutual Funds.

Acceptance: Please be advised that UMB Bank, n.a., has been appointed to serve as successor Custodian of this IRA.

_____
Authorized Signature Date