



P.O. Box 87 Denver, CO 80201-0087  
 Main (800) 955-9988 | Fax (303) 534-5627  
 info@sheltoncap.com

# Individual Retirement Account Transfer Form

## ACCOUNT HOLDER INFORMATION

Full Name/Account Title: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Daytime Phone: \_\_\_\_\_ Birthdate: \_\_\_\_\_  
 Evening Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

## PLEASE TRANSFER MY ACCOUNT FROM

Current Custodian Name: \_\_\_\_\_  
 Bank/Savings & Loan      Mutual Fund      Brokerage      Other  
 Street Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Account Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

## FROM ACCOUNT TYPE

IRA      Roth IRA      SEP IRA  
 Rollover IRA Account      SIMPLE IRA

## TO ACCOUNT TYPE

IRA      Roth IRA      SEP IRA  
 Rollover IRA Account      SIMPLE IRA

## INVESTMENT SELECTION

Open a New Shelton Capital Management Account Invested in the Shelton Funds (must also complete an IRA Application Form)

Invest in my Existing Shelton Capital Management Retirement Account(s)

Account#: \_\_\_\_\_ %      Account#: \_\_\_\_\_ %

## SIGNATURE

To Current Custodian:

Please consider this your authority to sell all my assets or \$ \_\_\_\_\_ of my assets in the account identified above and prepare a check made payable to Shelton Funds. It is my intention to transfer these assets to my account, for which Bank of Oklahoma acts as Custodian. Please check with current custodian, as a medallion signature guarantee may be required.

I certify that I have received and read the prospectus for the Fund into which I am transferring my IRA.

Owner Signature \_\_\_\_\_ Date \_\_\_\_\_

## CUSTODIAN ACCEPTANCE

Bank of Oklahoma agrees to accept the transfer of the above amount for deposit in a Bank of Oklahoma Individual Retirement Custodial Account for the Individual set forth in Account Holder Section of this form, and requests the liquidation and transfer of assets as indicated above.

Signature for Acceptance \_\_\_\_\_