



# Kinetics Mutual Funds, Inc

## IRA Transfer Form

[If this is for a new IRA Account, an IRA Application must accompany this form.]

Mail to: Kinetics Funds  
 c/o US Bancorp Fund Services, LLC  
 PO Box 701  
 Milwaukee, WI 53201-0701

Overnight Express Mail to: Kinetics Funds  
 c/o US Bancorp Fund Services, LLC  
 615 E. Michigan St. FL 3  
 Milwaukee, WI 53202-5207

For additional information, please call toll free **1-800-930-3828** or visit us on the web at [www.kineticsfunds.com](http://www.kineticsfunds.com).

### 1. Investor Information

\_\_\_\_\_  
 FIRST NAME MI LAST NAME

\_\_\_\_\_  
 SOCIAL SECURITY NUMBER

\_\_\_\_\_  
 ADDRESS

\_\_\_\_\_  
 CITY / STATE / ZIP

(\_\_\_\_\_) \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_  
 DAYTIME PHONE NUMBER EVENING PHONE NUMBER

### 2. Instructions to Current IRA Custodian or Plan Administrator

\_\_\_\_\_  
 CURRENT CUSTODIAN OR PLAN ADMINISTRATOR

\_\_\_\_\_  
 ACCOUNT NUMBER CONTACT PERSON CONTACT NUMBER

\_\_\_\_\_  
 ADDRESS

Please include a copy of your current account statement.

Consider this your authorization to send my IRA or my distribution from my qualified retirement plan:

- All Assets
- OR
- \$ \_\_\_\_\_ or \_\_\_\_\_%

Please process this request:

- immediately
- OR
- at maturity \_\_\_\_\_ (month / day / year)

**\* Please liquidate all assets if no selections are made.**

Type of account being transferred/rolled-over:

- Pension  PSP  401(k)  403(b)  Roth 401(k)  Roth 403(b)  Traditional IRA
- SEP IRA  SIMPLE IRA  Roth IRA  Other \_\_\_\_\_

Original Roth IRA funding year (if applicable) \_\_\_\_\_

Original SIMPLE IRA funding date (if applicable) \_\_\_\_\_

Send the check representing the assets payable to "Kinetics Funds" along with a copy of this form to:

Kinetics Funds  
 FBO [Shareholder Name]  
 [Account Number]  
 c/o US Bancorp Fund Services, LLC  
 PO Box 701  
 Milwaukee, WI 53201-0701



**7. 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 Kinetics Funds IRA on behalf of the Depositor authorizing this transfer or direct rollover.

U.S. Bank, N.A.,



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**Before you mail, have you:**

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