



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

Overnight Express Mail To: Kirr Marbach Partners Funds  
 c/o U.S. Bank Global Fund Services  
 615 E. Michigan St., FL 3  
 Milwaukee, WI 53202-5207

# IRA Transfer Form

For fund information, prices and literature please call Kirr, Marbach Partners Funds at **1-800-870-8039** or visit us on the web at **www.kmpartnersfunds.com**.

**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 \_\_\_\_\_

**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**

Open a new\* Kirr, Marbach Partners Funds Account.  Invest in my existing Kirr, Marbach Partners Funds Account.

\*If you are opening a new account, this form must be accompanied by a completed IRA Application.

<input type="checkbox"/> IRA	<input type="checkbox"/> IRA	Account # _____
<input type="checkbox"/> Rollover IRA	<input type="checkbox"/> Rollover IRA	_____
<input type="checkbox"/> SEP-IRA	<input type="checkbox"/> SEP-IRA	_____
<input type="checkbox"/> SIMPLE	<input type="checkbox"/> SIMPLE	_____
<input type="checkbox"/> Roth IRA	<input type="checkbox"/> Roth IRA	_____

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

**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. Bank Global Fund Services 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. Bank Global Fund Services  
 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 (MM/DD/YYYY)

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

**F. Special Note**  I am over 72 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.**