

Columbia Management Roth IRA Conversion Form

Use this form to convert from a Traditional IRA to a Columbia Management Roth IRA.

Part 1 Investor information: *Please type or print.*

Name (First, Middle Initial, Last)		Date of birth (MMDDYYYY)	
<input type="text"/>		<input type="text"/>	
City	State	Zip	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address		Apt/Lot/Unit	
<input type="text"/>		<input type="text"/>	
City	State	Zip	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Daytime phone number	Evening phone number	Social Security number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Part 2 Conversion instructions:

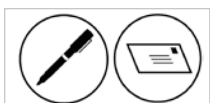
Convert my Columbia Management Traditional IRA with State Street Bank as Custodian to Columbia Management Roth IRA.

Fund name	Fund number	Amount	Or Percent*
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %

*Whole percents only

Convert my Traditional non-Columbia Management IRA to Columbia Management Roth IRA.

Current Custodian/Trustee	Attention	
<input type="text"/>	<input type="text"/>	
Address		
<input type="text"/>		
City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>



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For assistance completing this form, please contact a representative at 800.345.6611, Monday through Friday, 8:00 a.m. to 8:00 p.m. ET.

Part 2 Conversion instructions: *Continued.*

Current investments

Mutual Funds

Fund name

Account number

<input type="text"/>
<input type="text"/>
<input type="text"/>

<input type="text"/>
<input type="text"/>
<input type="text"/>

Part 3 Conversion instructions:

To current Trustee/Custodian:

Liquidate all or part \$ of the account described in Section 2, above and transfer the proceeds to my Columbia Management Roth IRA immediately or at maturity

Surrender the above referenced annuity contract(s), and forward proceeds in cash to my Columbia Management Roth IRA.

Transfer-in-kind all of my shares in the following Columbia Funds to my Columbia Management Roth IRA.

Only Columbia Fund Family are eligible for transfer-in-kind.

Fund name

Account number

<input type="text"/>
<input type="text"/>

<input type="text"/>
<input type="text"/>

Part 4 Investor information: *Check all that apply.*

Open a new Roth IRA account (Please attach completed Columbia Management IRA application).

Invest in my existing Columbia Management Roth IRA.

Transfer in kind. I am requesting a transfer of assets from a brokerage or bank Traditional IRA which is presently invested in the Columbia Funds.

Fund name

Existing account number

<input type="text"/>
<input type="text"/>

<input type="text"/>
<input type="text"/>

Part 5 Tax withholding election:

IRS regulations require the custodian of the IRA from which you are converting to withhold federal income taxes at the rate of 10% from the converted amount unless you elect not to have withholding apply. Withholding will apply to the entire amount of the conversion, even if non-deductible contributions to the IRA have been made. You may still reinvest the entire conversion amount by replacing the amount withheld with other assets. Any amounts withheld and not replaced into the new Columbia Management IRA within 60 days may be subject to a 10% early withdrawal penalty if you are under 59½ years old. Even if you elect not to have federal income tax withheld, you are liable for payment of federal income tax on the taxable portion of your converted amount. Certain state and local taxes may also apply to the converted amount.

Indicate your withholding election below:

NO, do NOT withhold federal income tax from the distribution from my IRA for conversion to a Columbia Management IRA account.

YES, withhold federal income tax from the distribution from my IRA for conversion to a Columbia Management IRA account at the rate of %
(Provide a whole percent of 10% or greater. Please check with your current custodian as to whether more than 10% can be withheld. If no percentage or if less than 10% is provided, then 10% will be withheld.)

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Part 6 Investor authorization:

The undersigned certifies to the State Street Bank and Trust Company, as accepting Custodian, that the IRA from which the assets are being transferred is a valid Individual Retirement Account, meeting the requirements of Internal Revenue Code Section 408(a), 408(k), 408(p) or 408A (as the case may be).

Investor's signature

X

Date (MMDDYYYY)

Medallion Signature Guarantee

(If required by current Custodian/Trustee. Please contact them for their requirements.)

Affix Medallion Signature Guarantee stamp here.

Name of bank or dealer firm

Signature of authorized person (not a Notary Public)

X

Date (MMDDYYYY)

Part 7 Custodian acceptance:

State Street Bank and Trust Company agrees to accept transfer of the above amount for deposit into the investor's Columbia Management Individual Retirement Account, and requests the liquidation and transfer of assets as indicated above.

By:

Date (MMDDYYYY)

Part 8 Return instructions:

Regular mail Columbia Management Investment Services Corp.
P.O. Box 8081
Boston, MA 02266-8081

Overnight mail Columbia Management Investment Services Corp.
c/o Boston Financial
30 Dan Road
Canton, MA 02021-2809