

Columbia Management IRA Transfer Form

Please type or print clearly and use a separate form for each company from which you are transferring assets to Columbia Management.

Use this form to authorize Columbia Management to initiate a direct transfer of your existing IRA to a Columbia Management IRA. (If you are establishing a new Columbia Management IRA, complete and attach a Columbia Management IRA Application.)

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

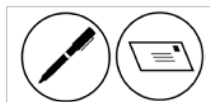
Name (First, Middle Initial, Last)		Date of birth (MMDDYYYY)	
Street address		Apt/Lot/Unit	
City	State	ZIP	
Daytime phone number	Evening phone number	Social Security Number	

Part 2 Type of IRA to be transferred:

Traditional IRA Roth IRA SEP IRA SARSEP IRA

Part 3 Transfer instructions to current IRA custodian or trustee: *Must be completed.*

Current Custodian	Attention	
Address		
City	State	ZIP
Phone number		



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Part 3 **Transfer instructions to current IRA custodian or trustee:** *Continued.*

Current investment Please transfer to my Columbia Management IRA. Minimum \$1,000 transfer per fund.

Mutual Funds

Fund name	Account number	Partial liquidation	Full liquidation	Transfer-in-kind*
<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"/>	\$ <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"/>	<input type="text"/>

Annuity

Account number

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

Certificate of Deposit — *This form must be received at least 4 weeks prior to maturity date.*

Account number Maturity date (MMDDYYYY)

Liquidate all **or** liquidate part (\$) of the certificate of deposit above and transfer the proceeds to my Columbia Management IRA immediately **or** at maturity.

Other (list type of investment)

Liquidate the above referenced account and forward proceeds in cash to my Columbia Management IRA.

**Please note, only Columbia Fund Family is eligible to be transferred-in-kind.*

Please make all checks payable to State Street Bank and Trust Company FBO (Account Holder's Name) IRA.

Part 4 **Investment instructions:** *Check all that apply. Must be completed.*

The minimum initial investment is \$1,000 per fund.

Open a new account. *(Please attach completed Columbia Management IRA Application.)* Invest as instructed below.

Invest in my existing Columbia Management IRA Account. Invest as instructed below.

Transfer-in-kind. I am requesting a transfer of assets from a brokerage firm or bank IRA which is presently invested in Columbia Fund Family.

Fund name	Existing account number	Amount
<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"/>

Part 5 Investor authorization:

I am over 70½. The Internal Revenue Service (IRS) requires you to withdraw an annual Required Minimum Distribution (RMD) from your IRA(s) (Roth IRAs excluded) once you obtain age 70½. If you have more than one IRA, you can add together all of your RMD amounts and withdraw the total amount from any of your Individual Retirement Accounts. If you do not annually withdraw the total RMD amount from your Individual Retirement Account(s), the IRS can impose a 50% penalty tax on the RMD amount that should have been withdrawn. Please contact Columbia Management for the appropriate distribution forms so that you may start or continue to receive your required minimum distributions. To request distribution forms, call a representative at the telephone number listed below.

Investor's signature

Date (MMDDYYYY)

X

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

Affix Medallion Guarantee stamp here.

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

Signature of authorized person (not a Notary Public)

Date (MMDDYYYY)

X

Part 6 Custodian acceptance:

State Street Bank and Trust Company agrees to accept transfer of the above amount for deposit into the Columbia Management Individual Retirement Account, and requests the liquidation and/or transfer of assets as indicated above. The Columbia Management Individual Retirement Account is a valid IRA as described in Section 408(a) of the Internal Revenue code.

Date (MMDDYYYY)

By:

Part 7 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

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.