



TRANSFER/ROLLOVER REQUEST FORM
Jones Lang LaSalle Income Property Trust

Forward To: First Trust Retirement, c/o DST Systems, Inc.

Regular Mail
PO Box 219165
Kansas City, MO 64121-9165
855-387-3847

Overnight Delivery
Mail Stop: LaSalle
430 West 7th Street
Kansas City, MO 64105-1407

Please Print or Type

IMPORTANT INFORMATION:

Please check with your current custodian for their Transfer/Rollover Requirements.

Step 1: NAME & ADDRESS

IRA Owner Name, Social Security Number, Existing Account Number (If applicable)
Address, City / State / Zip, Phone Number

Step 2: CURRENT CUSTODIAN NAME & ADDRESS

Funds are staying with First Trust Retirement as Custodian, changing investments only. (Please provide investment name & account number.)

Current Custodian Name, Current Custodian Phone Number, Current Investment Name/Fund Number
Current Custodian Address, City / State / Zip, Account # to be transferred

Please include a copy of your current statement.

Step 3: TYPE OF TRANSFER/ROLLOVER

- Transfer from Traditional IRA, Transfer from SEP IRA, Transfer from Roth IRA
Rollover from a Qualified Plan, SIMPLE IRA, 401(k), 403(b) or Profit Sharing Plan*
Custodian specific form included. FTR will include with the Letter of Acceptance sent to resigning custodian.

Step 4: TRANSFER INSTRUCTIONS TO CURRENT CUSTODIAN (check all that apply)

- Transfer Account listed in Step 2 and liquidate additional cash proceeds (If applicable).
Transfer in Kind Account listed in Step 2 and liquidate additional cash proceeds (If applicable).
Transfer funds from existing Undirected Cash Account.

Step 5: SIGNATURE REQUIRED

IRA Owner Signature, Date, Medallion Signature Guarantee if required by Current Custodian Listed in Step 2

FOR INTERNAL USE ONLY

Acceptance of Rollover/Transfer/Conversion by First Trust Retirement:

By: James F. Dobbie
First Trust Retirement Authorized Signature

Date

