

Please Print or Type

TRANSFER/ROLLOVER REQUEST

Pacific Office Properties Trust, Inc.

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

Regular Mail PO Box 219554

Kansas City, MO 64121-9554

Date

Overnight Delivery

Mail Stop: Pacific Office Properties

430 West 7th Street

IMPORTANT INFORMATION: 855-387-3847 Kansas City, MO 64105-1407 Please check with your current custodian for their Transfer/Rollover Requirements. Step 1: NAME & ADDRESS Social Security Number Existing Account Number (If applicable) **IRA Owner Name** 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 Rollover from a Qualified Plan, SIMPLE IRA, 401(k), 403(b) or Profit Sharing Plan* Transfer from SEP IRA *Your employer may require additional forms to process your request. Transfer from Roth IRA Custodian specific form included. FTR will include with the Letter of Are any of these funds/assets from an Inherited Account? Acceptance sent to resigning custodian. (This alerts FTR to include ☐ Yes ☐ No required additional documentation.) Step 4: TRANSFER INSTRUCTIONS TO CURRENT CUSTODIAN (check all that apply) Transfer Account listed in Step 2 and liquidate additional cash proceeds (If applicable). Select this option for moving assets out of the current investment, either to First Trust Retirement (FTR) as a new custodian or staying with FTR. (Issue a check payable to First Trust Retirement.) Amount to liquidate: All Partial liquidation of \$ Transfer in Kind Account listed in Step 2 and liquidate additional cash proceeds (If applicable). Select this option for a Transfer in Kind staying with the current investment that is changing custodians only. (Issue a check payable to First Trust Retirement.) Amount to transfer: Partial transfer of \$ Transfer funds from existing Undirected Cash Account. Amount to liquidate: Partial liquidation of \$ **Step 5: SIGNATURE REQUIRED** Medallion Signature Guarantee if required by Current **IRA Owner Signature** Date Custodian Listed in Step 2 **FOR INTERNAL USE ONLY** Acceptance of Rollover/Transfer/Conversion by First Trust Retirement:

Eirst Trust Retirement Authorized Signature