

Johnson Mutual Funds Trust  
 3777 West Fork Road  
 Cincinnati, OH 45247  
 513.661.3100 | 800.541.0170  
 513.661.3160 (fax)



For Internal Use

PM
A/C#
JIC A/C#

## ROTH IRA CONVERSION

**Instructions:** Use this form to transfer cash from an existing Traditional IRA to a Johnson Roth IRA. If you are opening a new Roth IRA, the completed Roth IRA application must accompany this Roth IRA Conversion form. Please be aware that your present institution may require additional documentation including a signature guarantee by a commercial bank or New York Stock Exchange member firm. Please complete all the information requested below. Johnson Mutual Funds Trust will process your transfer and the Custodian will send you notification when the cash has been received and invested. *Note: If you are 70½ or older this year, the minimum required distribution **MUST** be taken before the conversion is made.*

### 1. Participant Information

Name		Tax ID or SSN	
Address			
City	State	Zip Code	
Home Phone (include area code)	Daytime Phone (include area code)	Date of Birth	

### 2. Name, Address and Phone Number of Resigning Trustee

Name of Organization		Attention	
Address			
City	State	Zip Code	
Phone (include area code)	Account or Policy Number		

If current Custodian is Johnson Trust Company for Johnson Mutual Funds Trust, please indicate the account name number to be converted:

Account Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Type of Account to be Converted:

Traditional IRA      Rollover IRA

### 3. Deposit Amount

Transfer all full and fractional shares (estimated value of transfer \$\_\_\_\_\_ ) of the account(s) indicated in Section 2 and transfer the proceeds to my Johnson Roth IRA immediately at maturity. **Close the account.** Send any subsequent dividends or interest that post to my Johnson Roth IRA.

Liquidate or transfer \$\_\_\_\_\_ of the account indicated in Section 2 and transfer the proceeds payable to my Johnson Roth IRA immediately at maturity. **Do not close the account.**

#### Details of Liquidation:

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**4. Fund Selection**

If your transfer is not your initial investment, please indicate which Fund you would like your transferred assets to be invested in:

Make no changes to my current allocation in account # \_\_\_\_\_

Initial Investment (see accompanying Roth IRA Application)

**OR**

**\$ Amount or % per Fund**

Johnson Growth Fund	_____
Johnson Opportunity Fund	_____
Johnson Realty Fund	_____
Johnson Fixed Income Fund	_____
Johnson Municipal Income Fund	_____
Johnson Equity Income Fund	_____
Johnson International Fund	_____

**5. Authorization for Transfer**

**To Resigning Trustee or Custodian**

I have established a qualified Roth Individual Retirement Account with Johnson Mutual Funds Trust. Please use this letter as your authorization to liquidate assets in my account with your firm, as indicated below. To ensure proper crediting, please contact the Funds for trustee-to-trustee delivery instructions.

\_\_\_\_\_  
Investor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature Guarantee (if needed)

**6. New Custodian**

**To be Completed by New Custodian**

We have been requested to send you a letter of acceptance in order to transfer the assets of the above-mentioned account for deposit to the Johnson Mutual Funds Trust. To ensure proper crediting, contact the Funds for trustee-to-trustee delivery instructions.

This is to be executed as a trustee-to-trustee transfer so as not to put the plan participant in actual or constructive receipt of all or any part of the transferred assets.

\_\_\_\_\_  
Trust Officer's Signature

\_\_\_\_\_  
Date