



PARTICIPANT TO PARTICIPANT TRANSFER SETUP

Questions? Call 1-800-731-6870

Instructions: Complete this form **ONLY** if you would like the IIIT Class Client Services Group to add or remove Participant to Participant Transfer Instructions. After completion, submit this form through Connect, or fax or mail this form to the fax number or address at the bottom of this page.

Note: This form is only for Participant to Participant Transfers, which are transfers from your IIIT Class Account(s) to another Investor's IIIT Class Account(s) within the same investment option. IIIT encourages you to notify the Receiving Investor(s) regarding the nature of each Participant to Participant Transfer. Your new Participant to Participant Transfer Instructions may take the IIIT Class Client Services Group up to 24 hours to verify and set up on your Account. The instructions and authorized signature below permits the IIIT Class Client Services Group, per your direction, to establish transfer instructions to move money from your IIIT Class Account(s) to another Investor's IIIT Class Account(s).

SENDING INVESTOR INFORMATION: (All fields in this section must contain Sending Investor information ONLY.)

Investor Name: _____ (Name that appears on Trust records) TIN: _____ (Taxpayer Identification Number)

List the IIIT Class Account number(s) to which this form applies:

- 1. _____ 4. _____ 7. _____
- 2. _____ 5. _____ 8. _____
- 3. _____ 6. _____ 9. _____

RECEIVING INVESTOR INFORMATION: (All fields in this section must contain Receiving Investor information ONLY.)

Add	Remove	IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number
		IIIT Class Investor Name	IIIT Class Account Number

CERTIFICATION & SIGNATURE: (Please have a Contact, who is authorized per Trust records to update banking instructions, sign below.)

I hereby certify that I have obtained authorization from the Receiving Investor(s) to initiate transfers to the IIIT Class Account(s) listed above.

 Authorized Signature Date Phone #

 Print or Type Name of Authorized Signatory Title/Position Email Address

Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.

SEND VIA CONNECT: Log in to Account Access <i>Existing Connect</i> Click <input checked="" type="checkbox"/> Secure Contact <i>Users Only</i> Select file to upload - Send message	FAX TO: Illinois Trust Client Services Group 1-888-535-0120	MAIL TO: Illinois Trust Client Services Group P.O. Box 11760 Harrisburg, PA 17108
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TRUST USE ONLY	
V2022.04	INITIALS
Processed	
Confirmed	