



**New Lord Abbett Account:** Use this form, together with the **IRA Application**, to establish a new Lord Abbett IRA as a result of a transfer.

**Existing Lord Abbett Account:** Use this form to transfer your account, either from another financial institution or from another existing Lord Abbett account, into an existing Lord Abbett IRA.

- Please forward a copy of a current account statement for the account you wish to transfer to Lord Abbett.
- Retain a photocopy of this form for your records.

**Important information about procedures for opening a new account required by the U.S.A. PATRIOT ACT:** To help the government fight the funding of terrorism and money-laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account.

<p><b>OPENING AN ACCOUNT</b></p> <p><b>When you open an account, we will require:</b></p> <ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Social Security number or tax identification number</li> <li>▪ Date of birth</li> <li>▪ Address</li> </ul> <p>We may ask for other information that will allow us to identify you. We may also ask for copies of documents. If we are unable to obtain your required information, we will return your application. Your moneys will not be invested until we have obtained all required information. Please be sure to review and sign this application under <b>Step 6</b>.</p> <p><b>Mail completed application to:</b> Lord Abbett Service Center, PO Box 219336, Kansas City, MO 64121-9336</p> <p><b>Overnight Mail:</b> Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514</p> <p><b>Call Lord Abbett for assistance:</b> 888-522-2388 (Monday—Thursday between 8:30 a.m.–6:00 p.m. ET and Friday between 8:30 a.m.–4:00 p.m. ET)</p>	<p><b>FREE FEDEX SHIPPING</b></p> <p>We are offering FREE FedEx overnight shipping for your IRA paperwork. Simply call 888-522-2388 and select option 2 to speak with a Lord Abbett representative to obtain the FedEx information. Send IRA paperwork to:</p> <p><b>Lord Abbett Distributor LLC</b>  <b>330 West 9th Street</b>  <b>Kansas City, MO 64105-1514</b></p> <p><i>Please select Priority Overnight shipping.</i></p>
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**STEP 1: ACCOUNT OWNER INFORMATION**

Owner Name (First Name, MI, Last Name)	Social Security Number	Date of Birth (MM/DD/YYYY)
Email Address	Daytime Phone Number	

**STEP 2: INVESTMENT INSTRUCTIONS**

Please choose investment option A or B.

**A.**  Invest proceeds in a new Lord Abbett account. **B.**  Invest proceeds in my existing\* Lord Abbett IRA account(s) according to the following:

Lord Abbett Fund Name(s) <small>(If no investment elections are selected, any contributions will be invested in the Lord Abbett U.S. Government &amp; Government Sponsored Enterprises Money Market Fund.)</small>	Share Class (A or C) <small>(If a share class is not selected, Class A shares will be purchased.)</small>	Lord Abbett Account Number(s)	Percentage <small>(Total must equal 100%)</small>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

\*Please consult your tax or financial advisor regarding transfers between different types of accounts.

Please ensure to include along with this form an IRA Application if you are requesting the proceeds to be invested in a new Lord Abbett account.

**STEP 3: ACCOUNT YOU ARE TRANSFERRING**

Trustee/Custodian currently holding your account:

Name of Existing Trustee/Custodian (please see Special Note in Step 5)			
Address of Trustee/Custodian (required)	City	State	Zip Code
Contact Name	Contact's Phone Number (required)	Account Number to be Transferred (required)	



**STEP 6: SIGNATURE AND AGREEMENT (Continued)**

**Medallion Signature Guarantee or Signature Guarantee:** If you are liquidating securities, your existing trustee/custodian may require a medallion signature guarantee or signature guarantee (please contact your trustee/custodian to determine whether a medallion signature guarantee or a signature guarantee is required). To obtain a medallion signature guarantee or a signature guarantee, sign this form in the presence of an authorized person at a broker/dealer firm or other financial institution, such as a bank or trust company. A notarization from a notary public does not meet signature guarantee requirements.

**Please place Medallion Signature Guarantee  
or Signature Guarantee here.**

**STEP 7: CUSTODIAN'S ACCEPTANCE**

**Custodian's Acceptance:**

UMB Bank agrees to accept the transfer of the above amount for deposit to the investor's UMB Bank Individual Retirement Custodial Account, and requests the liquidation and the transfer of assets as indicated on the previous page.

\_\_\_\_\_  
UMB Bank, Custodian

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Date