



Use this form to convert your Lord Abbett Traditional or SIMPLE IRA account(s) to a Lord Abbett Roth IRA. **For current Lord Abbett shareholders only.**

**For IRA Accounts:**

**Mail completed form to:** Lord Abbett Service Center, PO Box 219336, Kansas City, MO 64121-9336  
**Overnight Mail:** Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514  
**Fax Instructions:** 816-843-7248 (Advisors are permitted to fax in paperwork provided the Medallion Signature Guarantee is legible. Shareholders are permitted to fax in paperwork provided a Medallion Signature Guarantee is not required.)  
**Call Lord Abbett for assistance:** 888-522-2388 (Monday–Friday between 8:30 a.m. and 6:00 p.m. Eastern Time)

**Mail completed form to:** Lord Abbett Service Center, PO Box 219604, Kansas City, MO 64121-9604  
**Fax Instructions:** 816-218-0072 (Advisors are permitted to fax in paperwork provided the Medallion Signature Guarantee is legible. Shareholders are permitted to fax in paperwork provided a Medallion Signature Guarantee is not required.)  
**Call Lord Abbett for assistance:** 888-223-0020 (Monday–Friday between 8:30 a.m. and 6:00 p.m. Eastern Time)

**STEP 1: ACCOUNT REGISTRATION INFORMATION**

Owner Name (First Name, MI, Last Name) \_\_\_\_\_ Last 4 digits of SSN# \_\_\_\_\_  
Email Address \_\_\_\_\_ Daytime Phone Number \_\_\_\_\_

**STEP 2: ROTH IRA CONVERSION**

**Roth IRA Conversion Request—choose either A, B, or C.**

Please convert my Lord Abbett IRA account(s) listed below to a single Roth IRA.

- A.**  Convert my account in whole.    **B.**  Convert my account in part, as instructed below.    **C.**  Convert my account to my existing Roth IRA.

| Fund Name | Account Number | Dollar Amount or Percentage to Convert |
|-----------|----------------|--|
| 1. _____  | _____          | _____                                  |
| 2. _____  | _____          | _____                                  |
| 3. _____  | _____          | _____                                  |

**Please note:** Effective November 29, 2013, the Lord Abbett Diversified Income Strategy Fund changed its name to Lord Abbett Multi-Asset Income Fund, the Lord Abbett Balanced Strategy Fund changed its name to Lord Abbett Multi-Asset Balanced Opportunity Fund, the Lord Abbett Growth & Income Strategy Fund changed its name to Lord Abbett Multi-Asset Growth Fund, and the Lord Abbett Global Allocation Fund changed its name to Lord Abbett Multi-Asset Global Opportunity Fund.

**If you wish to convert your Lord Abbett IRA into multiple Roth IRAs, please provide instructions in writing and attach them to this form.**

**STEP 3: WITHHOLDING REQUEST**

**Withholding—Selection**

I understand that unless I elect otherwise, withholding is required on all taxable transactions. A conversion from a traditional IRA to a Roth Conversion IRA may create a taxable transaction. Withholding amounts are sent to the IRS as a prepayment of federal income tax. Once taxes are withheld, the withholding will not be returned to you by Lord Abbett. In the absence of instructions, Lord Abbett will withhold taxes in the amount of 10% of the converted amount.

- Do not withhold.     Withhold \_\_\_\_\_% (in increments of 5%, not less than 10%).

**STEP 4: AUTHORIZED SIGNATURE**

I understand that current account options such as systematic purchases or withdrawals will not carry over to the new account.

I also understand that the beneficiary designation and investment option(s) of the current IRA and SIMPLE accounts will apply to the new Roth Conversion IRA(s). I acknowledge also and understand that the beneficiary designation may be changed at any time by submitting a completed Beneficiary Designation Change Form and that investment options may be changed at any time by requesting a telephone exchange to another eligible Lord Abbett fund of the same class.

If this action is being taken on behalf of a minor under the laws of the shareholder’s state of residence, a parent or guardian must sign this request form. Until the age of majority is attained, the parent or guardian will exercise the powers and duties of the shareholder.

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Authorized Name \_\_\_\_\_