



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—Thursday between 8:30 a.m.–6:00 p.m. ET and Friday between 8:30 a.m.–4:00 p.m. ET)

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 or B.

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

A. Convert my account **B.** Convert my account to my existing Roth IRA.

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

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%). State withholding \$_____ (this must be a dollar value)

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