IRA Transfer of Assets/ Direct Rollover Form

Motley Fool Funds
Declare Your Independence®

Use this form to transfer or roll over an existing retirement plan account to your Motley Fool Funds IRA.

You'll need the following to complete this form:
- The account number of your current plan provider.
- A copy of a recent statement from your current plan provider.

Mail this form to
Motley Fool Funds
P.O. Box 9780
Providence, RI 02940

Overnight Mail
Motley Fool Funds
4400 Computer Drive
Westborough, MA
10581

To open an account online, visit
www.foolfunds.com

For assistance, call
1-888-863-8803

1 About You

First Name | M.I. | Last Name | Suffix

Social Security Number | Date of Birth

Residential Address *(not a P.O. box)* | City | State | ZIP Code

2 Investment Instructions

2a NEW OR EXISTING ACCOUNT

If this is a new account you must meet the initial investment minimum of $500 per fund for the Investor Share Class or $100,000 for the Institutional Share Class.

❑ I am opening a new IRA and have included the application with this form.

❑ Deposit the proceeds into my existing Motley Fool Funds IRA: ______________
Account Number

2b INVESTMENT SELECTION

Motley Fool Fund	Share Class	Amount To Be Invested	Amount To Be Invested
Independence Fund	Investor (#101)	%	$
	Institutional (#301)	%	$
Great America Fund	Investor (#102)	%	$
	Institutional (#302)	%	$
Epic Voyage Fund	Investor (#103)	%	$
	Institutional (#303)	%	$
Total		**100%**	$

2c TYPE OF IRA TO TRANSFER INTO

❑ Traditional IRA ❑ Roth IRA ❑ SEP-IRA ❑ Rollover IRA ❑ Simple IRA

2d TYPE OF REQUEST

❑ Transfer of Assets (like plans)

❑ Direct Rollover from Qualified Plan

❑ Direct Rollover from 403(b) or 457

3 About Your Current Plan

3a TYPE OF ACCOUNT

If you are rolling over a qualified plan, please contact your plan Administrator for distribution/rollover forms.

My current plan type is:

- ❑ Traditional or Rollover IRA
- ❑ Roth IRA
- ❑ SEP-IRA
- ❑ 403(b)
- ❑ 457
- ❑ Qualified Plan

3b CUSTODIAN'S CONTACT INFORMATION

Custodian or Agent's Name ______________________ Phone ____________

Address ______________ City ____________ State ______ ZIP Code ________

3c CERTIFICATES OF DEPOSIT

For certificates of deposit, please indicate if you wish to have the funds transferred immediately, which may incur a redemption penalty if they have not matured, or at maturity. We cannot accept requests to transfer assets from certificates more than 60 days prior to their maturity.

❑ Immediately ❑ At maturity date: ______________
Maturity Date

3d INVESTMENTS TO TRANSFER

Please transfer the following investments to BNY Mellon Investment Servicing Trust Company as Custodian for Motley Fool Funds IRA.

Investment 1

Investment to Transfer ______________________ Account Number ____________

- ❑ Liquidate my entire account.
- ❑ Transfer part of my account: $ __________ or __________ shares.
(Please choose one.)
- ❑ Transfer to Motley Fool Funds shares "in kind."

Investment 2
(optional)

Investment to Transfer ______________________ Account Number ____________

- ❑ Liquidate my entire account.
- ❑ Transfer part of my account: $ __________ or __________ shares.
(Please choose one.)
- ❑ Transfer to Motley Fool Funds shares "in kind."

4 Signatures and Other Required Information

This form will be used by Motley Fool Funds to initiate a Transfer of Assets or a Direct Rollover from an existing retirement plan account as designated on this form to your IRA at Motley Fool Funds. Excluding a Roth IRA, if you are over age 70½, you are responsible for requesting a distribution of any Required Minimum Distribution due to be distributed in the calendar year. Please remember that a Transfer of Assets can only occur between the same type of retirement plan. For certificates of deposit, please indicate if you wish to have the funds transferred immediately, which may incur a redemption penalty if they have not matured, or at maturity. We cannot accept requests to transfer assets from certificates more than 60 days prior to their maturity.

Direct Rollover Information Certification

If this contribution is a Direct Rollover from a Qualified Plan, 403(b), or 457 Plan, I understand that by signing the front of this form I am acknowledging that the direct rollover contribution is an irrevocable election and is no longer eligible for special tax treatment which may be accorded to distributions from a Qualified Plan, 403(b), and 457 Plan. You may want to contact your current plan administrator or Custodian to ensure that you have completed any documents they may require in order to complete your request as well as establish the timing of the distribution. If you are over age 70½, please contact your current Custodian regarding the Required Minimum Distribution rules before initiating a Direct Rollover. The Custodian can only accept Direct Rollovers from a Qualified Plan to an IRA in the form of cash.

Terms and Conditions

I authorize the Transfer of Assets or Direct Rollover as noted above to my Motley Fool Funds IRA and authorize Motley Fool Funds and BNY Mellon Investment Servicing Trust Company to process this request on my behalf. I understand it is my responsibility to assure the prompt Transfer of Assets by the current Custodian. I have read and understand all information in the instructions and hereby provide the applicable direct rollover certification.

Please Sign Here

Signature of IRA Participant Date

Before signing this document, check with your current custodian or transfer agent to see if they require a signature guarantee. You can obtain a signature guarantee from a financial institution such as a bank or broker dealer that participates in one of the Medallion Signature Guarantee programs. A notary public cannot provide signature guarantees.

Medallion Signature Guarantee

(if required by your current Custodian or transfer agent)

Medallion Signature Guarantee stamp and signature

And that's it. Please mail (a) **this form**, (b) a copy of your **current account statement**, and (c) the appropriate new account **application for your IRA** (if required) to:

Motley Fool Funds, P. O. Box 9780, Providence, RI 02940

Overnight Mail: 4400 Computer Drive, Westborough, MA, 10581

For Resigning Custodian & BNY Mellon Use Only

INSTRUCTIONS TO RESIGNING CUSTODIAN

Issue check payable to: BNY Mellon Investment Servicing Trust Company as Custodian for Motley Fool Funds.

FBO Account Number

Mail check to: Motley Fool Funds, P.O. Box 9780, Providence, RI 02940

Overnight Mail: Motley Fool Funds, 4400 Computer Drive, Westborough, MA 10581

ACCEPTANCE CERTIFICATION

BNY Mellon Investment Servicing Trust Company accepts its appointment as Custodian of the above referenced IRA and has established an IRA as indicated by the shareholder on the front of this form under the Internal Revenue Code section 408(a) and 408A for IRAs under the shareholder's name in Motley Fool Funds. Motley Fool Funds and BNY Mellon, as Custodian, cannot accept assets other than cash. Upon receipt of the check, the proceeds will be credited to the participant's account. Accepted by BNY Mellon Investment Servicing Trust Company as Custodian for Motley Fool Funds IRAs.

Authorized Representative of BNY Mellon Investment Servicing Trust Company Date