

# The Berkshire Funds

Use this form only when transferring your existing IRA from another institution directly to a Berkshire Funds' IRA. If you are establishing a new IRA with the Berkshire Funds, a IRA Account Application must accompany this form. To request a IRA Account Application, please call toll-free **1-877-526-0707** or visit our website at **www.berkshirefunds.com**. If you have any questions, please contact an Investor Service Representative at 1-877-526-0707.

# IRA Transfer Form

**Please mail the completed IRA Transfer Form to:**

The Berkshire Funds  
 c/o Mutual Shareholder Services, LLC  
 8000 Town Centre Drive, Ste 400  
 Broadview Heights, OH 44147

**BERKSHIRE  
 FUNDS**

## 1. Social Security Number

\_\_\_\_\_

Social Security Number

## 2. Investor Information (Please Print or Type)

\_\_\_\_\_

Name (First, Middle, Last)

\_\_\_\_\_

Street

\_\_\_\_\_

City, State, Zip code

( ) ( )

\_\_\_\_\_

Daytime Telephone Evening Telephone

## 3. Information About Your Present IRA

Please attach a copy of a recent account statement to help us locate your current account.

\_\_\_\_\_

Name of current Trustee, Custodian or Institution

\_\_\_\_\_

Address

\_\_\_\_\_

City, State, Zip

( )

\_\_\_\_\_

Telephone Number

\_\_\_\_\_

Account Number

\_\_\_\_\_

Date of Maturity (if a Certificate of Deposit)

Check one:  Transfer immediately\*  Transfer upon maturity

\_\_\_\_\_

Name of Mutual Fund, Brokerage Firm or Bank

\*Penalties may be assessed for early withdrawal.

Asset Transfer or Conversion	
Type of plan you now have:	Type of plan you are transferring to:
<input type="checkbox"/> Traditional IRA	<input type="checkbox"/> Traditional IRA
<input type="checkbox"/> Rollover IRA	<input type="checkbox"/> Rollover IRA
<input type="checkbox"/> Roth IRA	<input type="checkbox"/> Roth IRA
<input type="checkbox"/> Roth Conversion IRA	<input type="checkbox"/> Roth Conversion IRA
<input type="checkbox"/> SEP-IRA	<input type="checkbox"/> SEP-IRA
<input type="checkbox"/> SIMPLE IRA	
<input type="checkbox"/> Other Employer Sponsored Plan: _____	

## 4. Your Fund Selection(s) Please check one

Open a new Berkshire Fund account:  
 If you are opening a new account, your completed IRA application must accompany this form.

Invest the proceeds in my existing Berkshire Fund account.

Berkshire Focus Fund

\_\_\_\_\_ \$ \_\_\_\_\_ %  
 Account Number (if applicable) Amount or Percentage

Berkshire Technology Fund

\_\_\_\_\_ \$ \_\_\_\_\_ %  
 Account Number (if applicable) Amount or Percentage

Total Investment \$ \_\_\_\_\_ 100%  
 Amount or Percentage

## 5. Transfer Authorization (Your signature is required)

To the current Trustee/Custodian:  
 I have established an IRA with The Berkshire Funds.  
 Please consider this your authority to liquidate and transfer (check one)

All assets in my account or  \$ \_\_\_\_\_ %  
 Amount or Percentage

of my assets in the account identified in Section 3 and prepare a check made payable to **The Berkshire Funds**. It is my intention to transfer these assets to an IRA account with the above named Fund(s) for which Firststar Bank, N.A. acts as Custodian.

**I certify that I have received and read the Prospectus for the Fund(s) into which I am transferring my IRA.**

**X** \_\_\_\_\_  
 Your Signature Date

Please check with your current Trustee/Custodian to determine if a signature guarantee is required to process this transfer.

A signature guarantee may be obtained from any eligible guarantor institution. These institutions include U.S. banks, savings associations, credit unions and brokerage firms. **A Notary Public cannot provide a Signature Guarantee.**

Signature Guarantee. Place Guarantee Stamp and Authorized Signature here:

\_\_\_\_\_

FOR OFFICE USE ONLY - DO NOT WRITE BELOW THIS LINE TO BE COMPLETED BY FIRSTSTAR BANK, N.A., CUSTODIAN FOR THE BERKSHIRE FUNDS

Please be advised that Firststar Bank, N.A., has been appointed to serve as successor Custodian of this IRA. Please send the check representing the liquidation of the investments indicated above along with a copy of this form to identify the check as a transfer of assets to:

**The Berkshire Funds**  
 c/o Mutual Shareholder Services, LLC  
 8000 Town Centre Drive, Ste 400  
 Broadview Heights, OH 44147

(If you prefer to wire funds directly, please call 1-877-526-0707 for further instructions)

**X** \_\_\_\_\_  
 Authorized Signature Date