



Cornerstone
CAPITAL GROUP

Radically Practical Investing™

Account Application Instructions

General Application: Use for Individual, Joint, Trust, Corporation, Partnership and/or other Entities.

- ✓ Please select the applicable account type in **Section 1A**. *If you select Trust, Corporation, Partnership or other Entity, please complete the **Certification Regarding Beneficial Owners of Legal Entity Customers** on Pg.4.* Part two must be completed/signed by natural U.S. person with signatory authority.
- ✓ Please provide your mailing address/telephone number in **Section 1B**; if your legal address is different, complete **1C**.
- ✓ Please complete **Section 2-7**.
- ✓ If you are interested in establishing Electronic Funds Transfer instructions, please complete **Section 8** and include a voided check.
- ✓ Please sign/date in **Section 9**.

Wire instructions to follow.

If you have any additional questions or need assistance, please contact Cornerstone Capital Funds at 1-800-986-6187.



Cornerstone
CAPITAL GROUP

Radically Practical Investing™

Account Application Instructions: Roth IRA

Use for Roth IRA, Roth Conversion IRA and/or Beneficiary IRA.

- ✓ **Pg. 1-14**
 - Disclosures for your reference.
- ✓ **Pg. 15**
 - Please complete **IRA HOLDER'S INFORMATION, INVESTMENT SELECTION, IRA ACCOUNT/CONTRIBUTION TYPE**. If opening a Rollover IRA, select rollover from Roth.
 - If interested in establishing Electronic Funds Transfer instructions, please complete **Banking Instructions** and include voided check.
- ✓ **Pg. 16**
 - Please complete **DESIGNATION OF BENEFICIARY(IES)**.
 - Please complete **SPOUSAL CONSENT** if applicable.
 - Please sign/date as **IRA Holder**.

Roth IRA Transfer Request: Use to authorize partial/full transfer of Funds in an existing IRA.

- ✓ Please include copy of current statement.
- ✓ Please complete **IRA HOLDER'S NAME AND ADDRESS, SSN, DATE OF BIRTH & HOME PHONE**.
- ✓ Please complete **TRANSFER ACCOUNT TYPE, INVESTMENT INSTRUCTIONS and TRANSFER INSTRUCTIONS**
- ✓ Please sign/date as **IRA Holder** at bottom left section **SIGNATURE OF IRA HOLDER**
- ✓ A Medallion Signature Guarantee may be required by your current IRA custodian. IF this is the case, a space has been provided for the stamp.

Wire instructions to follow.

If you have any additional questions or need assistance, please contact Cornerstone Capital Funds at 1-800-986-6187.



Cornerstone
CAPITAL GROUP

Radically Practical Investing™

Account Application Instructions: Traditional IRA

Use for Traditional IRA, SEP IRA, SIMPLE IRA, Rollover IRA and/or Beneficiary IRA.

- ✓ **Pg. 1-17**
 - Disclosures for your reference.
- ✓ **Pg. 18**
 - Please complete all information within **IRA HOLDER'S INFORMATION, INVESTMENT SELECTION, IRA ACCOUNT/CONTRIBUTION TYPE**. If opening a Rollover IRA, Select rollover from QP (qualified plan) or IRA.
 - If interested in establishing Electronic Funds Transfer Instructions, please complete **Banking Instructions** and include voided check.
- ✓ **Pg. 19**
 - Please complete **DESIGNATION OF BENEFICIARY(IES)**.
 - Please complete **SPOUSAL CONSENT** if applicable.
 - Please sign/date as **IRA Holder**.

Traditional IRA Transfer Request: Use to authorize partial/full transfer of Funds in an existing IRA.

- ✓ Please include copy of current statement.
- ✓ Please complete **IRA HOLDER'S NAME AND ADDRESS, SSN, DATE OF BIRTH & HOME PHONE**.
- ✓ Please complete **TRANSFER ACCOUNT TYPE, INVESTMENT INSTRUCTIONS and TRANSFER INSTRUCTIONS**.
- ✓ Please sign/date as **IRA Holder** at bottom left section **SIGNATURE OF IRA HOLDER**.
- ✓ A Medallion Signature Guarantee may be required by your current IRA custodian. IF this is the case, a space has been provided for the stamp.

Wire Instructions to follow.

If you have any additional questions or need assistance, please contact Cornerstone Capital Funds at 1-800-986-6187.