

# MH Elite Portfolio of Funds Trust

Send completed forms to:  
MH Elite Portfolio of Funds Trust  
43 Highlander Drive  
Scotch Plains, NJ 07076

## IRA TRANSFER OR DIRECT ROLLOVER REQUEST FORM

For assistance in completing this form call 1-800-318-7969  
Please print or type

### General Information:

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Soc. Sec. No. \_\_\_\_\_ Address \_\_\_\_\_  
Daytime Phone \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
Evening Phone \_\_\_\_\_ Account Number \_\_\_\_\_

### Transfer/Direct Rollover Request:

I have established an IRA with MH Elite Portfolio of Funds Trust of which Huntington National Bank serves as Custodian.

I request that my retirement funds be: (check one) Allocated to:  
 Transferred from another IRA MH Elite Small Cap Fund of Funds \$ \_\_\_\_\_ or \_\_\_\_\_ %  
 Directly rolled over from my MH Elite Fund of Funds \$ \_\_\_\_\_ or \_\_\_\_\_ %  
employer-sponsored retirement plan MH Elite Select Portfolio of Funds \$ \_\_\_\_\_ or \_\_\_\_\_ %  
MH Elite Income Fund of Funds \$ \_\_\_\_\_ or \_\_\_\_\_ %

Current Account Type:  IRA  SEP  Roth  401K  403B  Other \_\_\_\_\_

I authorize my present IRA Custodian/Trustee, or the administrator of my current retirement plan, to directly send the assets indicated below to my IRA with MH Elite Portfolio of Funds Trust. **Please include a copy of your latest IRA statement.**

Name of present Custodian, Trustee, or Employer Plan Administrator \_\_\_\_\_ Account# \_\_\_\_\_  
Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Payment Information:

Payment Schedule: I authorize and direct you to send my assets as follows:

- (1)  Immediately liquidate all assets and send the cash proceeds
  - (2)  Send cash proceeds of all investments at maturity
  - (3)  Liquidate only the following investments listed below
- | Investment | Shares or Dollars to be liquidated |
|------------|------------------------------------|
| _____      | _____                              |
| _____      | _____                              |
| _____      | _____                              |

### Signatures and Certifications:

I certify that I have established an IRA with MH Elite Portfolio of Funds Trust, of which Huntington National Bank is the Custodian. I agree to contact my present Custodian that I am transferring from to determine if specific documentation or signature guarantee is required. I understand that I am responsible for determining my eligibility for all transfers or direct rollovers. I agree to hold the Custodian harmless against any and all situations arising from an ineligible transfer or direct rollover. I acknowledge that the Custodian cannot provide legal advice and I agree to consult my own tax professions for advice.

\_\_\_\_\_  
Signature of Individual Date (You may wish to retain a copy of this form for your records)

For office use only. Huntington National Bank hereby confirms that it has accepted its appointment as Custodian of the MH Elite Portfolio of Funds Trust IRA.  
Make check(s) payable to: Huntington National Bank FBO \_\_\_\_\_  
Mail check(s) to: MH Elite Portfolio of Funds Trust, 43 Highlander Drive, Scotch Plains, NJ 07076

\_\_\_\_\_  
Signature Title Date