

TRANSFER NON-QUALIFIED TO RETIREMENT PLAN ACCOUNT

To Whom It May Concern:

Thank you for your inquiry regarding information related to a transfer of assets from your Primerica Shareholder Services non-retirement account and using the assets to fund an existing, or establish a new retirement (Traditional IRA, ROTH IRA or Coverdell ESA) plan account. To process your request, shares will be sold in one account to purchase shares in your new or existing account. **Selling shares may be a taxable event.** Please consult your tax advisor prior to requesting a transfer of assets.

In response to your request, we have included information regarding your request to transfer assets. Please read this letter carefully and the instructions provided. You may not use these instructions or the attached form to transfer assets in an account due to death of account owner, divorce or other events.

The attached form or a Letter of Instructions will be required by the Transfer Agent to process your transfer request. If you are using a letter of instructions, you must provide all the information stated on the attached form and provide specific instructions for your request.

An original signature guarantee may be required to process your transfer request and may be obtained from an officer of most financial institutions. A medallion signature guarantee is preferable. If the signature guarantee is NOT medallion, you will be required to provide the name and phone number of the person providing the signature guarantee for verification purposes. Please note that a notary public cannot provide a signature guarantee. A signature guarantee is a warranty by the grantor that the signature is genuine, and that the person(s) signing is competent and authorized to sign.

If you have questions, need additional information, or need assistance locating a Representative, please contact our Customer Service Department at 1-800-544-5445. Customer Service Representatives are available to assist you, Monday through Friday between 8 a.m. and 8 p.m. ET.

PRIMERICA SHAREHOLDER SERVICES

TRANSFER FORM- FOR NON-QUALIFIED TO RETIREMENT PLAN ACCOUNT INSTRUCTIONS

You may use this form to transfer assets from your non- retirement account with Primerica Shareholder Services (PSS) to establish and fund your Retirement (Traditional IRA, Roth IRA or Coverdell ESA) Plan Account. The transfer must be within the same share class and fund company.

If you do not have an existing PSS Retirement Plan Account with the registration you desire, you must complete the appropriate New Account Application and the Customer Identification Form for the type retirement plan you wish to establish. You must contact a PFS Investments Inc., representative for assistance in completing the New Account Application and Customer Identification Form.

Please mail or fax (see fax service) completed form and if required the appropriate Retirement Plan Application to:

Primerica Shareholder Services, PO Box 534485, Pittsburgh, PA 15253 - 4485, or for express mail Primerica Shareholder Services, Attention: 534485, 500 Ross Street, 154-0520 Pittsburgh, PA 15262.

Fax Service: If you have an existing Retirement account with PSS for which the assets are to be deposited and your request does not require an original signature guarantee, you may fax the attached completed form to 508-599-1892 for processing your request.

You must provide your name and non-qualified account number from which assets are to be transferred. This is required to process your request.

Section 1:

Please check the appropriate box to indicate how we are to process your transfer request.

Do you want to transfer all the shares in all fund positions in your non-qualified account to a new or existing IRA (Traditional or Roth) account? Do you want a specific number of shares transferred from your non qualified account or do you want a specific dollar amount transferred? Please indicate from which fund position we are to transfer a specific share or dollar amount. **Selling shares from your non-qualified account to purchase shares in another account may be a taxable event.** Please consult your tax advisor before requesting a transfer of the assets.

Section 2:

Please indicate the type of retirement plan you wish to establish by checking the appropriate box. If your retirement plan is already established, please provide your existing retirement plan account number. Please indicate if the assets are being invested for a current year contribution or prior year contribution (Jan 1 – Tax filing deadline). If you are establishing a new retirement plan account with Primerica Shareholder Services (PSS), please check the box, complete and attach the appropriate Retirement Plan New Account Application to this form and mail to PSS. You must contact a Primerica Financial Services Representative for assistance in completing the New Account Application and Customer Identification Form.

Section 3:

You only need to complete this section if your assets are being transferred to an existing retirement plan account with PSS. Please indicate how we are to invest the proceeds transferred from your non-retirement plan account to your existing retirement plan account. Do you want a specific number of shares invested into your retirement plan account from your non qualified account, or do you want a specific dollar amount invested? Please indicate the fund position(s) we are to invest a specific share or dollar amount into your retirement plan account.

Section 4:

To transfer the assets from your non-qualified account to fund your retirement plan account, all registered account owners must sign the Transfer Form - For Non-Qualified To Retirement Plan Account. You may be required to provide a signature guarantee if:

- The Owner of the IRA account receiving the transfer is not a listed Owner on the Non-Qualified Account the transfer is coming from.
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SSN #: ___/___/___
 Date of Birth: ___/___/___

**PRIMERICA SHAREHOLDER SERVICES
 TRANSFER FORM- NON-QUALIFIED TO
 RETIREMENT PLAN ACCOUNT**

You may use this form to transfer assets from your Primerica Shareholder Services (PSS) non-qualified (non retirement account) account to establish and fund your PSS Retirement Plan Account (Traditional/Roth IRA, or Coverdell ESA). The transfer must be within the same share class and fund company. If you do not have an existing Retirement Plan Account with the registration you desire, you must complete the appropriate New Account Application and the Customer Identification Form for the type retirement plan you wish to establish.

You must provide the PSS account number from which the assets will be transferred. The account number is required to process your request.

Account Owner's Name: _____

Account Number:

1. Please indicate the number of shares or the dollar amount you wish to transfer and the fund positions.

- Transfer all shares in all fund positions Transfer # of shares from the fund number(s) provided
 Transfer the dollar amount stated from the fund number(s) provided

FROM Account:	Fund Number/ NASDAQ Symbol	# of Shares	\$ Dollar Amount
Fund 1	<input type="text"/>	# <input type="text"/>	\$ <input type="text"/>
Fund 2	<input type="text"/>	# <input type="text"/>	\$ <input type="text"/>
Fund 3	<input type="text"/>	# <input type="text"/>	\$ <input type="text"/>

Type of Retirement Plan Desired: Traditional IRA ROTH IRA Coverdell ESA

2. Please indicate if your retirement plan is an existing or new PSS account.

- Existing Account: Current Year Contribution
 New Account (New Account Application Required) Prior Year Contribution
(Jan 1 thru tax filing deadline)

3. Please indicate how the proceeds from your PSS non-qualified account are to be invested in your existing PSS retirement plan account. Contributions to retirement plan accounts are subject to each year's maximum contribution limit.

TO Account:	Fund Number	# of Shares	\$ Dollar Amount
Fund 1	<input type="text"/>	# <input type="text"/>	\$ <input type="text"/>
Fund 2	<input type="text"/>	# <input type="text"/>	\$ <input type="text"/>
Fund 3	<input type="text"/>	# <input type="text"/>	\$ <input type="text"/>

4.

Owner's Signature _____ Date _____

Signature Guarantee Stamp

Joint Owner's Signature _____ Date _____

Signature Guarantee Stamp

Guarantor Name _____ Guarantor Phone No. _____
 SIGNATURE GUARANTEE STAMP: I/We guarantee the signature(s) of the applicant(s) and to the best of my knowledge and belief the applicant is of full age and legally competent. A separate signature guarantee stamp must be affixed to this form for each signor.