

Roth IRA Conversion

Complete this form to convert an existing *Wells Fargo Advantage Funds*® Traditional, SIMPLE (that has been opened for two years), or SEP-IRA to a *Wells Fargo Advantage Funds* Roth IRA. If you have questions or would like to convert a non-*Wells Fargo Advantage Funds* IRA, call **1-800-222-8222**.



P.O. Box 8266 | Boston, Massachusetts 02266
www.wellsfargo.com/advantagefunds

1 REGISTRATION AND MAILING ADDRESS (PLEASE PRINT)

_____ Name of account owner (first, middle initial, last)	_____ Social Security number	_____ Date of birth (mm/dd/yyyy)	
_____ U.S. residential street address	_____ City	_____ State	_____ ZIP code
_____ U.S. mailing address (if different than U.S. residential street address)	_____ City	_____ State	_____ ZIP code
_____ E-mail address	_____ Daytime phone	_____ Evening phone	

2 EXISTING ACCOUNT INFORMATION

A Roth IRA conversion is a tax-reportable event. See IRS Form 8606 and its instructions or contact your tax advisor for tax-reporting requirements.

List the account information and conversion amount for each *Wells Fargo Advantage Funds* IRA you would like converted to a *Wells Fargo Advantage Funds* Roth IRA.

Note: If you are over 70½, your required minimum distribution (RMD) is NOT eligible to be converted to a Roth IRA.

Fund and account number	Conversion Amount
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %
_____	\$ _____ or _____ %

3 WITHHOLDING ELECTION FOR CONVERSION

If no box is checked, we will withhold 10%.

Choose one:

- I elect **not** to have federal income tax withheld from this distribution.
- I elect to have _____% federal income tax withheld from this distribution (**must be 10% or greater**).

Important state tax withholding information: We will withhold state tax in accordance with the respective state's rules if, at the time of distribution, your address of record is within a mandatory withholding state and you have federal income tax withheld. Contact your tax advisor if you have questions regarding your specific situation.

Note: If no withholding election is indicated above, IRS regulations require that 10% federal tax withholding be taken from your distributions. If you are under the age of 59½, a premature distribution penalty may apply to the withholding amount that is not converted. We encourage you to consult your accountant or tax advisor regarding your IRA distributions. Even if you elect not to have federal income tax withheld, you are liable for payment of federal income tax on the taxable portion of your distribution. You may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding are not adequate.

4 FUND SELECTION

List the account information and allocation for each *Wells Fargo Advantage Funds* Roth IRA you would like to convert your IRA to.

_____	\$ _____ or _____ %
Existing Roth IRA Fund and account number (or list the Fund name if new*)	
_____	\$ _____ or _____ %
Existing Roth IRA Fund and account number (or list the Fund name if new*)	
_____	\$ _____ or _____ %
Existing Roth IRA Fund and account number (or list the Fund name if new*)	

***Note:** If you are establishing a new Roth IRA, complete and submit a **Wells Fargo Advantage Funds** IRA Application with this form.

To complete this request, your signature is required on page 2 of this form.

5 SIGNATURE(S)

I hereby acknowledge my responsibility for determining that this transaction qualifies as a conversion under Internal Revenue Service (IRS) conversion regulations and that I should seek the advice of an attorney or tax advisor regarding my specific situation. I understand that this transaction will result in a taxable event and will be reported to the IRS. I further acknowledge that I assume full and complete responsibility for my tax liability.

Sign and date here.

X

Signature of owner or guardian (if IRA owner is a minor)

Print name

Date

Before you mail, have you:

Completed an IRA Application if the conversion is going into a new account?

Signed this form in section 5?

Entered your Social Security number in section 1?