Vanguard

VRPA Transfer Request Form

Effective July 2024

Use this form to request a transfer of all account assets from a Vanguard Investment-Only Account (Retirement Trust) to a Vanguard Retirement Plan Access (VRPA) plan at Ascensus.

Questions?
Call 877-662-7447.

Please note:

- Ensure that the address on your Vanguard account is up to date. You can check/update your address by either logging in to **vanguard.com** or calling the phone number listed above. An incorrect address could delay the processing of your request.
- Do not use this form to take a distribution or request installment payments.
- Print in capital letters and use black ink.

1. Account owner information

Provide the full legal name. >

Vanguard account number	
Name of trustee *first, middle initial, last*	
Last four digits of Social Security number	Zip code
Name of trust or organization	

2. Plan information at Ascensus

Ascensus plan number
Ascensus plan name

3. How assets will be transferred

Vanguard will transfer to Ascensus all assets of the retirement plan identified in Section 1. All shares of eligible Vanguard mutual funds transfer in-kind. Investment allocations can be changed once in the new VRPA plan account(s).

For information on which Vanguard mutuals funds are eligible for transfer and holding in your VRPA account, please contact Ascensus. Account holdings ineligible for in-kind share transfer require liquidation and transfer of cash to Ascensus. Vanguard cannot send the retirement plan assets to VRPA if unliquidated nontransferable securities are in the account.

Action required by the trustee before submitting this form

For mutual fund accounts, liquidations do not require further action.

For Vanguard Brokerage Accounts, liquidation requires the authorized person(s) to sell nontransferable holdings, which can include ETFs, stocks, bonds, CDs, and non-Vanguard mutual funds, to the settlement vehicle before submitting this form. Complete this on **vanguard.com** or by calling Vanguard Personal Investor.

Contact Ascensus to determine which, if any, Vanguard mutual funds in the account are not eligible for in-kind transfer and must be sold.

Cash transfer information for Ascensus

Wells Fargo Bank, N.A.
ABA: 121000248
Account: 2001165836
Title: Ascensus Trust Company
Credit: Plan Number ______________________

Ascensus Trust Company
1655 43rd Street South, Suite 100
Fargo, ND 58103

We'll send a separate wire and charge a $10 fee for each fund you sell in a mutual fund account and for each wire out of a Vanguard Brokerage Account settlement vehicle. We don't charge a wire fee for clients with at least $1 million in qualifying Vanguard assets.

4. Signature (REQUIRED)

I hereby instruct Vanguard Marketing Corporation and The Vanguard Group, Inc., to transfer my retirement plan account assets as indicated on this form. Upon request, I give Vanguard permission to forward account confirmations regarding this transfer to Ascensus, and/or the Ascensus Trust Company, who is receiving the assets.

Signature of Plan Trustee is required for investment-only retirement trust accounts. If more than one trustee, only one trustee needs to sign.

Sign with *today's date* here, if applicable. >

Signature	Today's date *mm dd yyyy*
X	M M – D D – Y Y Y Y

Mailing information

Make a copy of your completed form for your records.

Mail your completed form and any attached information to one of the addresses below.

Mail to: >

Vanguard
P.O. Box 982901
El Paso, TX 79998-2901

For overnight delivery, mail to: >

Vanguard
5951 Luckett Court, Suite A1
El Paso, TX 79932-1882

Vanguard Brokerage Services is a division of Vanguard Marketing Corporation, member FINRA and SIPC.

Reminders

Please utilize the following resources to obtain a breakdown of your Vanguard account:

- Your third-party administrator.
- Your accountant, payroll department, or legal counsel.
- Your account on Vanguard's website (**vanguard.com**):

Transaction history

You can access your transaction history online by following these steps:

1. Log in to your account at **vanguard.com**.
2. From the **Transact** dropdown, select **Transaction history**.
3. From the **Select an account** dropdown, select the appropriate account.
4. Filter the results for specific time periods, securities, and transaction types.

Statements

Account statements are generated quarterly for the periods ending March 31, June 30, September 30, and December 31 and are available online approximately eight days after each quarter's end. For your convenience, you can view and print your account statements online any time by following these steps:

1. Log in to your account at **vanguard.com**.
2. Select the **Documents & statements** paper icon in the navigation menu, select **Statements**.
3. Select the year of the statement and click **Update Table**.
4. Open the PDF and save/print the statement, as needed.

After researching the areas above, Vanguard can provide assistance by calling 877-662-7447.