

# BREAD & BUTTER FUND IRA APPLICATION

Mail to:

Mutual Shareholder Services

8000 Town Centre Rd, #400  
Broadview Heights, OH 44147

For help with this form call:  
(888) 476-8585 toll free

## ACCOUNT INFORMATION *(please print)*

NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY/STATE/ZIP \_\_\_\_\_  
BUSINESS PHONE ( ) \_\_\_\_\_ HOME( ) \_\_\_\_\_

SOCIAL SECURITY \_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
DATE OF BIRTH \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
EMAIL \_\_\_\_\_

## CONTRIBUTION INFORMATION

Account Type (check one):

- Traditional                       SEP IRA  
 Roth                                       Spouse IRA  
 Rollover                               Transfer  
 Coverdell Education Savings Account  
(formerly Education IRA)

Initial Contribution (check one):

- Check payable to the Bread & Butter Fund  
Amount \$ \_\_\_\_\_ for tax year \_\_\_\_\_  
 Direct Rollover  
(Attach IRA Transfer Request form)  
 Direct Transfer  
(Attach IRA Transfer Request form)

## DESIGNATION OF BENEFICIARY

In the event of my death, pay my IRA balance to the primary beneficiary(ies) listed below of whoever survives me.

FULL NAME	SOCIAL SECURITY OR TAXPAYER'S ID	RELATIONSHIP	DATE OF BIRTH	PERCENT*
1. _____	____-____-____	_____	____/____/____	_____%
2. _____	____-____-____	_____	____/____/____	_____%
3. _____	____-____-____	_____	____/____/____	_____%

\*If no percentage indicated the beneficiaries will share equally.

## SIGNATURES AND CERTIFICATIONS

I certify under the penalty of perjury that my social security number stated above is correct, that I am of legal age in my state of residence, and I agree that the designation of the tax year for my deposit and my election to treat a deposit as a rollover (if applicable) are irrevocable. By signing this application, I hereby authorize and appoint **Huntington National Bank** to act as Custodian of my account. I indemnify **Huntington National Bank** when making distributions in accordance with my beneficiary designation on file or in accordance with Custodial Account Agreement absent any such designation. I acknowledge that I have received the IRA Disclosure Statement and the IRA Custodial Account Agreement at least seven days prior to the date I signed this application. I have read both, which are incorporated in the application by reference, and I accept and agree to be bound by the terms and conditions contained in the IRA Custodial Account Agreement. I also certify that I have received and read the current Prospectus and understand that mutual fund shares are not obligations of or guaranteed by a bank, nor are the insured by the FDIC.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_/\_\_\_\_/\_\_\_\_  
DATE

\_\_\_\_\_  
SPOUSAL SIGNATURE (if applicable)

\_\_\_\_/\_\_\_\_/\_\_\_\_  
DATE

\_\_\_\_\_  
HUNTINGTON NATIONAL BANK SIGNATURE

\_\_\_\_/\_\_\_\_/\_\_\_\_  
DATE

**Huntington National Bank** accepts this application and agrees to act as Custodian of the account. A confirmation will be sent to you regarding the above transaction(s) and will serve as notification of the Custodian's acceptance.

**BREAD & BUTTER FUND**  
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**AUTOMATIC INVESTMENT PLAN**

YES, I/we want to institute the Automatic Investment Plan.

Permits you to initiate automatic transfers to your Bread & Butter Fund IRA from your bank, savings and loan, or credit union using ACH system. You must attach a voided check to this application. Money will be transferred only from the account indicated on the check.

AMOUNT \$\_\_\_\_\_ (MINIMUM \$100)

FREQUENCY:     MONTHLY     BI-MONTHLY     QUARTERLY

DAY FOR INVESTMENT:     5TH     20TH

It is understood that this authorization may be terminated by me/us at any time by written notification to Bread & Butter Fund. The termination request will be effective as soon as the Fund has had reasonable time to act upon it.

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**DUPLICATE CONFIRMATIONS AND STATEMENTS**

Please send duplicate confirmations and statements to:

NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY/STATE/ZIP \_\_\_\_\_

IF BROKER-DEALER/ADVISOR:  
REP NAME: \_\_\_\_\_  
BRANCH NUMBER: \_\_\_\_\_  
PHONE: \_\_\_\_\_

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