ARTISAN PARTNERS

ARTISAN PARTNERS FUNDS

Education Savings Account Transfer Form

Use this form to transfer Education Savings Account assets to an Artisan Partners Funds Coverdell Education Savings Account from your current custodian. Upon receipt of this form, we will contact your current custodian to arrange the transfer.

Please complete this entire Education Savings Account Transfer Form, sign it and mail it and additional documentation, if applicable, to Artisan Partners Funds. Failure to complete all required sections will result in processing delays. Please retain a copy of the completed form for your records.

We encourage you to consult with your legal counsel and/or tax advisor in completing this form regarding the tax consequences and tax requirements of transferring Education Savings Account assets.

For Regular Mail Delivery
Artisan Partners Funds
c/o Boston Financial Data Services
P.O. Box 8412
Boston, MA 02266-8412

For Overnight Delivery
Artisan Partners Funds
c/o Boston Financial Data Services
30 Dan Road
Canton, MA 02021-2809

Questions? Call 800.344.1770 or visit www.artisanpartners.com

1. Information About the Person Who Controls the Current Account (Please type or print clearly)

To transfer your Education Savings Account, we need to know how it is registered with your current custodian. Complete a separate form for each account being transferred.

☐ Mother ☐ Father ☐ Guardian (If Guardian, submit proof of guardianship) ☐ Student (If Student, skip Section 2)

Name (First, Middle, Last) | Social Security Number | Date of Birth (MM-DD-YYYY)

Street Address*

City | State | Zip

Mailing Address (If different from Street Address)

City | State | Zip

( )
Phone | Email

*You must be a US resident with a US mailing address. If your mailing address is a post office box, you must also provide a US residential address to invest in Artisan Partners Funds.

2. Student Information

Insert the name of the Student for whom the Education Savings Account is maintained (as specified in Section 1 of the Artisan Partners Funds Education Savings Account Application).

Student's Name (First, Middle, Last) | Social Security Number | Date of Birth (MM-DD-YYYY)

Street Address*

City | State | Zip

Mailing Address (If different from Street Address)

City | State | Zip

( )
Phone | Email

*You must be a US resident with a US mailing address. If your mailing address is a post office box, you must also provide a US residential address to invest in Artisan Partners Funds.

3. Artisan Partners Funds Investment

Check one of the following:

☐ I am opening a new Artisan Partners Funds Coverdell Education Savings Account and am attaching my completed Education Savings Account Application.

☐ I already own an Artisan Partners Funds Coverdell Education Savings Account into which I am making this transfer:

Account Number | Amount ($) or Percent (%)

Account Number | Amount ($) or Percent (%)

As the undersigned, I acknowledge that I have sole responsibility for my investment choices and that I have received a current prospectus for each Fund I select.

As the undersigned, I understand that the requirements for a valid transfer to an Education Savings Account are complex and that I have the responsibility for complying with all requirements and for the tax implications of any such transfer.

Custodian Acceptance

UMB Bank, n.a. agrees to accept transfer of the above amount for deposit to the Artisan Partners Funds Coverdell Education Savings Account, and requests the liquidation and transfer of assets as indicated below.

See attached Letter of Acceptance for the signature of an authorized officer of the custodial agent.

Send redemption proceeds by check made payable to:

Artisan Partners Funds
FBO (SHAREHOLDER'S NAME)

Mail to the following address:

Artisan Partners Funds
c/o Boston Financial Data Services
P.O. Box 8412
Boston, MA 02266-8412

4. Transfer Instructions

List the assets you are transferring to your Artisan Partners Funds Coverdell Education Savings Account. We will contact your current custodian to arrange the transfer.

A) Account Information

Account Number

Name of Mutual Fund, Brokerage Firm or Bank in which your Education Savings Account is invested

B) Current Custodian

Current Custodian's Name

Street Address

City | State | Zip

C) Transfer

Please transfer assets from the above account to Artisan Partners Funds. The transfer should be by check (Made payable to Artisan Partners Funds), wire or a transfer of shares of Artisan Partners Funds:

☐ Transfer the total amount in the account.

☐ Transfer $_____ and retain the balance.

☐ Transfer-in-kind shares of Artisan Partners Funds.

☐ All or ☐ $_____ or ☐ _____% of assets in the above-referenced account.

5. Signature of Student, Parent or Guardian (If student is a minor, the parent or guardian must execute this form)

I certify to the current Coverdell Education Savings Account Custodian that I have established a successor Education Savings Account meeting the requirements of Internal Revenue Code Section 530 to which assets will be transferred, and further certify to UMB Bank, n.a. that the Education Savings Account from which assets are being transferred meets the requirements of Internal Revenue Code Section 530. By signing below, I authorize and direct the current Custodian to make the transfer specified in the form.

Signature (As it appears in Section 1) Date (MM-DD-YYYY)

Medallion Signature Guarantee

Your current Custodian may require a Medallion Signature Guarantee in order to process the transfer. Please check with your Custodian and obtain a Medallion Signature Guarantee if necessary. A Medallion Signature Guarantee may be obtained from a bank, credit union, or brokerage firm (called the guarantor). A notary public cannot provide a Medallion Signature Guarantee. The guarantor assumes financial liability for the authenticity of the signature. Medallion Signature Guarantees must cover the amount of the requested transaction. There are several different surety bond amounts, so it is important to obtain a bond equal to or greater than the amount of your transaction(s). If the surety bond amount of the Medallion Signature Guarantee is less than the amount of your transaction(s), your request will be rejected. There is a unique identification number with a letter prefix on each medallion that signifies the dollar amount covered by the guarantor. **Please note that a Notary Public stamp or seal is different from a Medallion Signature Guarantee and is not acceptable.**

Name of Bank or Firm Providing Medallion Signature Guarantee

Authorized Signature and Stamp Date (MM-DD-YYYY)

Stamp