

# 2020 RMD 60-Day Rollover Form

**Regular Mail:** Bridges Investment Fund  
c/o U.S. Bank Global Fund Services  
PO Box 701  
Milwaukee, WI 53201-0701

**Overnight Delivery:** Bridges Investment Fund  
c/o U.S. Bank Global Fund Services  
615 E. Michigan St., FL3  
Milwaukee, WI 53202-5207

Instructions: Use this form to rollover your 2020 Required Minimum Distribution (RMD) back to your mutual fund account within 60 days. If you want to rollover a partial amount, or if you want to rollover your RMD to an account other than the one that your RMD was distributed from, you should not use this form. Instead, please write a complete letter of instruction to accompany your check.

## Account Information

If this box is checked, I give the Fund authorization to update the address of record to the address listed on this form under Owner Name if it is different than the Fund's records.

<small>NAME OF TAXABLE OWNER</small>	<small>SOCIAL SECURITY / TAX ID NUMBER</small>	<small>PHONE NUMBER</small>
<small>STREET ADDRESS</small>	<small>CITY / STATE / ZIP</small>	
<small>MUTUAL FUND FAMILY NAME</small>		

## 2020 RMD 60-Day Rollover

**IMPORTANT:** Be sure you understand your eligibility and all rules for an IRA RMD 60-Day rollover. Consult your tax advisor.

I have taken an RMD in the past 60 days of \$ \_\_\_\_\_. Please roll this amount back into my account(s) from which the distribution(s) came, as follows (make check payable to your mutual fund family):

<small>FUND NUMBER</small>	<small>ACCOUNT NUMBER</small>	<small>DOLLAR AMOUNT</small>
<small>FUND NUMBER</small>	<small>ACCOUNT NUMBER</small>	<small>DOLLAR AMOUNT</small>
<small>FUND NUMBER</small>	<small>ACCOUNT NUMBER</small>	<small>DOLLAR AMOUNT</small>

By checking this box I request that any federal tax withholding be refunded and included in the rollover. I understand that federal taxes withheld from a distribution can be refunded only if the rollover is done in the same calendar year as the withholding. (see note below regarding state taxes)

**Note: State tax withholding cannot be refunded. If state taxes were withheld from your RMD, you may include the withheld tax amount in your rollover. If you do not return the state tax withheld it may become taxable income. Please consult your tax advisor.**

## Signature

I understand and agree that neither U.S. Bank, N.A. nor any of its affiliates (collectively the "Custodian") have made any determination or recommendation regarding my eligibility to rollover my 2020 RMD, and that I am responsible for consulting with my own legal, tax, and other advisors to determine my eligibility. I agree to indemnify and hold Custodian harmless from and against any and all losses or liabilities resulting from the rollover of my 2020 RMD.

X	
<small>SIGNATURE OF OWNER</small>	<small>DATE (MM/DD/YYYY)</small>