Account Transfer Form

For Non-Retirement Accounts

INSTRUCTIONS FOR COMPLETING THIS FORM

The purpose of this form is to process a transfer shares between non-retirement accounts held at BlackRock, transfer an account at another institution to BlackRock, or to gift shares to another individual, trust, or organization with an existing BlackRock account.

The following instructions will help you complete this application, however if you have any questions we encourage you to call us for assistance at **1-800-441-7762**.

Important Notes Regarding this Form:

- The signatures of ALL existing owners (or those acting on their behalf, i.e. as power or attorney) are required for any changes.
- These signatures typically require a **medallion signature guarantee stamp,** but in certain instances we may accept a notary– our team can inform you which stamp is needed.

Additional Documentation

Certain requests may require additional documentation to complete, including but not limited to:

- **Account Statements** – a copy of the most recent statement at the current institution
- **Trust accounts** – copy of pertinent trust pages, showing trust name, date, trustees' names, signature & certification pages, etc.
- **Power of Attorney** – a recently dated copy of the power of attorney document; if adding the POA to the account, the BlackRock Power of Attorney Form should also be provided.
- **Estates** – document naming the executor/executrix, administrator, etc. of the estate of the deceased shareholder
- **Corporations-** an original copy of a corporate resolution with a medallion guarantee or raised corporate seal

Gifting of Shares

"Gifting" of shares is when the owner(s) of the shares give shares to another person or entity, such as relative or charity. Once gifted, the person gifting the shares does not retain any ownership of those shares.

- You can use this form to "gift" shares you own to another individual, trust, organization etc. account.
- Complete **Sections 1b** and **1b** to indicate the shares you wish to gift
- Gifting of shares requires a **medallion guarantee stamp in section 3, "Signatures".**

Account Transfer

- You can use this form to transfer shares from another institution into BlackRock.
- Complete **Section 2a, 2b and 2c** to process a full or partial account transfer.
- A medallion signature guarantee stamp may be required by the institution where the account is currently held.
- Please contact the current institution and confirm their requirements before submitting this form to BlackRock.

Account Transfer *to* another Institution

- You cannot use this form to transfer your BlackRock account ***to*** another institution. Most firms have their own form or process to accomplish this.
- Please contact the institution you would like to transfer your BlackRock account to for instructions on completing the transfer.

Questions? Call us at **1-800-441-7762**, Monday through Friday between 8:00 AM and 6:00 PM ET or visit us online at www.blackrock.com.

BlackRock

Account Transfer Form
For Non-Retirement Accounts

- You can use this form to request a transfer of non-retirement account assets from another institution into BlackRock, or to transfer shares between accounts held directly at BlackRock (i.e. gifting of shares)
- Do not use this form to change your name or update your account registration – please use our Change of Name Form or Change of Registration Form.
- **Be sure to use the right application!** IRAs and BlackRock CollegeAdvantage 529 accounts have their own forms.

Mail this form, along with any other required documents, to:

Regular mail:
BlackRock Funds
PO Box 534429
Pittsburgh PA
15253-4429

Overnight mail:
BlackRock Funds
Attention: 534429
500 Ross Street 154-0520
Pittsburgh, PA 15262

Fax: 844-569-5573

Questions? Call us at **1-800-441-7762**, Monday through Friday between 8:00 AM and 6:00 PM ET or visit us online at www.blackrock.com.

Current BlackRock Account and Contact Information

Please complete this section about your BlackRock accounts(s):

______________________________ Full name of primary account owner (or trustee, custodian, guardian, etc.)

______________________________ Contact telephone number

______________________________ Full name of secondary account owner (or trustee, minor, etc.)

______________________________ Contact telephone number

______________________________ Social Security Number

______________________________ BlackRock account number(s)

______________________________ Reference number (if any)

1a. Transferring Shares between Accounts Held at BlackRock

Use this section ONLY if you are transferring shares from your account(s) held directly at BlackRock to another account(s) held directly at BlackRock.

To request a transfer from another financial institution, please proceed to **Section 2** of this form.

Please tell us about your transfer:

Use these choices to transfer shares between accounts where one or more owners of the original account will remain (i.e. between an Individual account and that individual's Trust account).

☐ I am transferring shares to a *new* account at BlackRock and have attached the required New Account Application.

☐ Please transfer into my existing BlackRock account - account number: __________________

Use these choices to gift shares to another person or entity – i.e., the current owner on the account will not be listed on the new account at all. This choice would commonly be used for a charitable contribution of shares.

☐ I am gifting shares to an individual, organization, etc. with an existing BlackRock account: ______________________ (BlackRock Account number)

☐ I am gifting shares to a new account to be held at BlackRock (application provided by the new account owner)

1b. Transferring or Gifting of Shares Instructions

Complete this section to inform us how you would like your shares to be transferred between accounts.
Please note that this will be processed as a transfer in-kind, a transfer of shares that are already invested in BlackRock mutual funds.

For a transfer-in-kind, the allocation should match the funds they are leaving – i.e. "BlackRock Fund A" to "BlackRock Fund A", etc.

Additional purchases of Investor A Shares are subject to a front-end sales charge, while Investor C Shares are subject to a contingent deferred sales charge "CDSC". If you do not elect a class of shares or provide any statement showing the current class of shares, your investment will be made in Investor A Shares.

***For Institutional & Class K Shares:** Most common for transfer-in-kind (existing shareholders). If you do not already own this share class, please review the Fund's prospectus for minimum investment requirements and eligibility for Institutional and Class K Shares (Class K Shares are not available on every fund). If you select Institutional or Class K Shares and do not qualify, your investment may be rejected.

☐ Entire Account **OR** ☐ Partial Amount $ ____________

For partial transfers, please which funds you wish to transfer from:

Fund Name	Share Class A	C	K*	Inst*	Amount
______________________	☐	☐	☐	☐	$__________ (dollars), ________ (shares) **or** ____ (%)
______________________	☐	☐	☐	☐	$__________ (dollars), ________ (shares) **or** ____ (%)
______________________	☐	☐	☐	☐	$__________ (dollars), ________ (shares) **or** ____ (%)
______________________	☐	☐	☐	☐	$__________ (dollars), ________ (shares) **or** ____ (%)
______________________	☐	☐	☐	☐	$__________ (dollars), ________ (shares) **or** ____ (%)

Total Amount to Transfer: $ ________________ = 100 %
(Must include an estimated amount)

Proceed to the Signatures section.

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2a. Transferring INTO BlackRock from another Institution

Instructions to the Current Institution

Tell us how you would like your shares to be transferred by choosing to "liquidate and transfer" your account or have it processed as a "transfer-in-kind" (moving shares of BlackRock funds). BlackRock will not require a Medallion Signature Guarantee in order to request a transfer from another institution, however, the current institution may require one.
Please contact the current institution and confirm their requirements before submitting this form to BlackRock.

Name of current institution: ____________________	PO Box/Street #: ________ Street name: ____________________
Full name of account owner (trustee, guardian, custodian, etc.): ____________________	City: ____________ State: ______ ZIP code: ______
Full name of co-account owner (trustee, guardian, minor, etc.): ____________________	Contact telephone number: ____________________
Account number: ____________ Account number: ____________	Fax number (if accepted by fax): ____________________
OR: ALL accounts under this Social Security number: ____________________	

Liquidate and Transfer: (For when the current account is ***not*** invested in BlackRock mutual funds)	**OR**	**Transfer In-Kind:** (For when the current account ***IS*** invested in BlackRock mutual funds)
☐ Entire Account (full liquidation)		☐ Entire Account
☐ Partial Amount: $________________ (total amount)		☐ Partial Amount: $________________ (total amount)
If partial amount, liquidate from the following:		If partial amount, transfer-in-kind from the following:
____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)		____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)
____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)		____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)
____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)		____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)
____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)		____________ From fund name $________ (dollars), ________ (shares) **or** ____ (%)
☐ Include all cash in the listed account		☐ Include all cash in the listed account

2b. Instructions to BlackRock

Please tell us about your transfer (check all that apply):

☐ I am opening a new account and have attached the required New Account Application.

☐ Please deposit the proceeds into my existing BlackRock, account number: ___________________

I am requesting a Transfer *from* the following account type:

☐ Individual ☐ Joint Tenant with Rights of Survivorship ☐ UTMA/UGMA under _____ (State) Rules ☐ Trust
☐ Custodian/ Guardian ☐ Estate ☐ Foundation ☐ S-Corporation ☐ C-Corporation
☐ Unincorporated Entity ☐ Other: ______________________

I will be transferring *into* this type of account at BlackRock:

☐ Individual ☐ Joint Tenant with Rights of Survivorship ☐ UTMA/UGMA under _____ (State) Rules ☐ Trust
☐ Custodian/ Guardian ☐ Estate ☐ Foundation ☐ S-Corporation ☐ C-Corporation
☐ Unincorporated Entity ☐ Other: ______________________

2c. How to Allocate the Transfer Proceeds

In this section, tell us about the account that you are transferring ***into BlackRock***, and how to allocate the amount that is transferred to us. For a transfer-in-kind of BlackRock mutual fund shares, you should include a copy of the most recent statement showing the existing BlackRock shares.

☐ New Accounts: Please allocate using the attached Account Application. (For existing accounts, complete the following)

For a transfer-in-kind (meaning, the existing assets are currently in BlackRock mutual funds), the allocation should match the funds they are leaving – i.e. "BlackRock Fund A" to "BlackRock Fund A", etc. Since we may not see what that allocation was at your current custodian, please provide it below.

Minimum initial investment when opening a new account is: For Investor A & C, $1,000 per fund or $50 with an Automatic Investment Plan.

Additional purchases of Investor A Shares are subject to a front-end sales charge, while Investor C Shares are subject to a contingent deferred sales charge. If you do not elect a class of shares or provide any statement showing the current class of shares, your investment will be made in Investor A Shares.

***For Institutional & Class K Shares:** Most common for transfer-in-kind (existing shareholders). If you do not already own this share class, please review the Fund's prospectus for minimum investment requirements and eligibility for Institutional and Class K Shares (Class K Shares are not available on every fund). If you select Institutional or Class K Shares and do not qualify, your investment may be rejected.

Fund Name	Share Class A	C	K*	Inst*	Amount
________________________	☐	☐	☐	☐	$__________, ________ or ____ (dollars) (shares) (%)
________________________	☐	☐	☐	☐	$__________, ________ or ____ (dollars) (shares) (%)
________________________	☐	☐	☐	☐	$__________, ________ or ____ (dollars) (shares) (%)
________________________	☐	☐	☐	☐	$__________, ________ or ____ (dollars) (shares) (%)
________________________	☐	☐	☐	☐	$__________, ________ or ____ (dollars) (shares) (%)

Total Amount to invest: $ __________________ = 100 %
(Must include an estimated amount)

3. Sign here to authorize transfer / gifting of shares

All registered owners of the account the shares are being transferred from must sign here to authorize transfer or gift of the account(s) referenced in Section 1.

In the event one or more owners are incapacitated or deceased, the named responsible individual (i.e. POA, personal representative, executor-trix, etc.) should sign indicating their capacity. We may request additional documentation to verify the responsible individual's authority to act. Please indicate the date of death for our records.
If your signature requires a medallion signature guarantee or notary stamp, it can be placed anywhere near the signature or in the box provided. Please refer to the instructions for this form or call our team with any questions prior to submitting.

____
Signature of existing owner / trustee / custodian, etc.

__________________ _______________
Title / Capacity (if any) Date (mm/dd/yyyy)

Place any notary seal or Medallion Signature Guarantee stamp here

For Notary Public:

State of ________________ County of _______________

On this______day of______________, 20_____, before me, the undersigned Notary Public,______________________________, personally appeared and proved through satisfactory evidence of Identification to be the person whose name is signed above and acknowledged by:

____
Signature of Notary Public

____
Signature of existing co-owner / trustee / custodian, etc.

__________________ _______________
Title / Capacity (if any) Date (mm/dd/yyyy)

Place any notary seal or Medallion Signature Guarantee stamp here

For Notary Public:

State of ________________ County of _______________

On this_____day of______________, 20_____, before me, the undersigned Notary Public,_______________________________, personally appeared and proved through satisfactory evidence of Identification to be the person whose name is signed above and acknowledged by:

____
Signature of Notary Public

Questions? Call us at **1-800-441-7762**, or visit us online at www.blackrock.com.

Not FDIC Insured | May Lose Value | No Bank Guarantee

Lit. No. TRANSFER-0323

BlackRock