

Request for Transfer of Interest in the Event of a Gift

In the event of a gift, the following documentation will be required:

1. Request Form for Transfer of Interest in the Event of a Gift **OR** a separate Letter of Direction; and
2. Copy of the trust document, if the gift is being made by a trust.

Please note:

1. When we are in receipt of the above documentation, we will draw up a form of Assignment to be executed by all parties;
2. If the interest is being transferred to a trust, we will require a copy of the trust document in order to establish this type of new account;
3. We require original signatures and are unable to accept documents and correspondence in connection with transfers via facsimile or e-mail; and
4. All information should be directed to us at:

Cheryl Pala
Director of Investor Services
M & J Wilkow, Ltd.
180 North Michigan Avenue
Suite 200
Chicago, Illinois 60601

Request for Transfer of Interest in the Event of a Gift

Current Investor or Account (“Transferor’s”) Name: _____

Transferor’s Tax ID Number: _____

Phone number and email address for the Transferor: _____

Address of the Transferor: _____

Names of Wilkow-related partnerships to be transferred:

1. _____

2. _____

3. _____

If there are further holdings, please attach on a separate sheet.

Information about the New Investor or Account (“Transferee’s”), including Name(s), Tax ID Numbers (TIN), addresses, and number of units of partnerships to be transferred:

Transferee’s Name: _____ **TIN:** _____

Address of Transferee: _____

Partnership Name: _____ **Number of Units:** _____

Partnership Name: _____ **Number of Units:** _____

Partnership Name: _____ **Number of Units:** _____

Transferree's Name: _____ TIN: _____

Address of Transferee: _____

Partnership Name: _____ Number of Units: _____

Partnership Name: _____ Number of Units: _____

Partnership Name: _____ Number of Units: _____

Transferree's Name: _____ TIN: _____

Address of Transferee: _____

Partnership Name: _____ Number of Units: _____

Partnership Name: _____ Number of Units: _____

Partnership Name: _____ Number of Units: _____

If there are additional transferees, please attach their information on a separate sheet.

Should you have any questions concerning these requirements, please contact us at (312) 726-9622 or via e-mail [at cpala@wilkow.com](mailto:cpala@wilkow.com).

We reserve the right to require additional information on a case-by-case basis, if necessary, to establish ownership identity or authority.

Transferor's Certification:

I hereby certify that the information and direction included herein are complete to the best of my knowledge.

Signature of the Transferor

Print name