



## REQUEST FOR TRANSFER OF EQUITY

Please transfer the deferred equity balance to the accounts below:

Account Number: \_\_\_\_\_

Client Name: \_\_\_\_\_

Equity should be transferred to:

\_\_\_\_\_ % to \_\_\_\_\_ Account: \_\_\_\_\_

\_\_\_\_\_ % to \_\_\_\_\_ Account: \_\_\_\_\_

\_\_\_\_\_ % to \_\_\_\_\_ Account: \_\_\_\_\_

\_\_\_\_\_ % to \_\_\_\_\_ Account: \_\_\_\_\_

Reason for transfer request:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*Accumulated deferred equity will be paid to the recipient in the future as approved by the board.

Once approved by the board, the equity will belong to the accounts listed above.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Approved \_\_\_\_\_ Date \_\_\_\_\_  
(For Board of Directors)

MaxYield is not responsible for potential tax consequences to the account holders based upon the transfer of equity. Please consult a tax professional if you have questions. Accounts receiving an equity transfer are not required to hold membership status.