

Roth IRA Conversion Form

Use this form to convert a Traditional, SEP or SIMPLE (after the required two year holding period) IRA to a Munder Funds Roth IRA. If you currently do not have a Munder Funds IRA, please submit a completed IRA Account Application & Adoption Agreement along with this form. This form is not intended for initiating conversions from employers 401(k) or 403(b) plans. For conversions from non-Munder Fund accounts, the Custodian will initiate the transfer for you once we have received all of the necessary information. Beginning in 2010, there are no eligibility requirements converting a Traditional, SEP or SIMPLE IRA into a Roth IRA. **Conversion from an existing Traditional, SEP or SIMPLE IRA to a Roth IRA may incur taxes. You should consult your tax advisor before submitting this request.** For additional information, please contact Shareholder Services at 800.438.5789 or visit our website at munder.com.

PLEASE PRINT IN BLOCK CAPITAL LETTERS

1. PARTICIPANT INFORMATION

First Name	Middle Initial	Last Name
<input style="width: 95%;" type="text"/>	<input style="width: 20px;" type="text"/>	<input style="width: 95%;" type="text"/>
Social Security Number (Taxpayer Identification Number)		Date of Birth
<input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> — <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> — <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>		<input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> / <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> / <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>
Street Address		
<input style="width: 98%;" type="text"/>		
<input style="width: 98%;" type="text"/>		
City	State	Zip Code
<input style="width: 85%;" type="text"/>	<input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>	<input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>
Daytime Telephone Number	Munder Funds Roth IRA Account Number (if known)	
<input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> — <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> — <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>	<input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>	

2. IRA TO BE CONVERTED

The traditional, SEP or SIMPLE IRA to be converted to a Munder Funds Roth IRA is:

- My existing Munder Funds IRA. (Complete sections 3, 6 and 7.)
- My existing IRA with another financial institution. (Complete sections 4, 5, 6 and 7 in addition to an IRA Account Application & Adoption Agreement.)

3. MUNDER FUNDS IRA INFORMATION

Complete this section to convert your existing Munder Funds Traditional, SEP or SIMPLE IRA to a Munder Funds Roth IRA. Conversions will be processed with the same Fund(s) as were held in your Traditional, SEP or SIMPLE IRA.

Munder Funds Traditional IRA Account Number:

- Convert ALL of my Traditional, SEP or SIMPLE IRA to a Roth IRA
- Convert PART of my Traditional, SEP or SIMPLE IRA as follows:

Fund Name	Class
<input style="width: 95%;" type="text"/>	<input style="width: 20px;" type="text"/>
<input type="checkbox"/> Partial Amount \$ <input style="width: 200px;" type="text"/>	OR <input type="checkbox"/> Number of Shares: <input style="width: 200px;" type="text"/>
Fund Name	Class
<input style="width: 95%;" type="text"/>	<input style="width: 20px;" type="text"/>
<input type="checkbox"/> Partial Amount \$ <input style="width: 200px;" type="text"/>	OR <input type="checkbox"/> Number of Shares: <input style="width: 200px;" type="text"/>
Fund Name	Class
<input style="width: 95%;" type="text"/>	<input style="width: 20px;" type="text"/>
<input type="checkbox"/> Partial Amount \$ <input style="width: 200px;" type="text"/>	OR <input type="checkbox"/> Number of Shares: <input style="width: 200px;" type="text"/>

For additional Funds, please complete another Roth IRA Conversion Form.

4. CURRENT CUSTODIAN/TRUSTEE (non-Munder Funds IRA)

Complete this section to convert your non-Munder Funds Traditional, SEP or SIMPLE IRA to a Munder Funds Roth IRA.

Name of Current Custodian/Trustee

Street Address

City

State

Zip Code

Contact Person (if any)

Phone Number

5. INSTRUCTIONS TO CURRENT CUSTODIAN/TRUSTEE (non-Munder Funds IRA)

Complete this section to convert your non-Munder Funds Traditional, SEP or SIMPLE IRA to a Munder Funds Roth IRA.

Please liquidate from the account(s) below and transfer in cash:

Type of IRA with current custodian/trustee: Traditional (including SEP) SIMPLE

Name of Investment

Account Number

Transfer ALL

 OR

Dollar Amount

For Certificate of Deposit: Immediately* OR At Maturity Date

Name of Investment

Account Number

Transfer ALL

 OR

Dollar Amount

For Certificate of Deposit: Immediately* OR At Maturity Date

Name of Investment

Account Number

Transfer ALL

 OR

Dollar Amount

For Certificate of Deposit: Immediately* OR At Maturity Date

Name of Investment

Account Number

Transfer ALL

 OR

Dollar Amount

For Certificates of Deposit: Immediately* OR At Maturity Date

For additional Funds, please complete another form. *Note: If you wish to have certificates of deposit transferred immediately and they have not matured, you incur a redemption penalty. We cannot accept requests to convert CD's more than 60 days prior to maturity.

6. TAX WITHHOLDING ELECTION

IRS regulations require the custodian or trustee of your IRA to withhold federal income taxes from the conversion distribution at the rate of 10% unless you elect not to have withholding apply. Withholding will apply to the entire amount of the conversion distribution, including the amount of any non-deductible contributions that may have been made to the IRA. You may not convert any portion of required minimum distributions (RMDs). You may still invest the entire amount of the conversion distribution into your Munder Funds Roth IRA by using other assets to replace previous amounts withheld as a prepayment of federal income taxes. Remember, if you use assets of your IRA to pay taxes on the conversion distribution amount (either by liquidating additional shares or by not replacing amounts withheld for federal income tax), the IRA assets used to pay those taxes will be considered a premature distribution (if you are under the age of 59½) since they are not being converted into the Roth IRA or rolled over into another IRA and you could also be subject to a 10% early withdrawal penalty.

If you do not select a box below, you will be deemed to elect 10% tax withholding.

- I elect NOT to have federal income tax withheld from this conversion distribution.
- Withhold federal income tax of 10% from this conversion distribution. If you want to elect a greater %, enter it here:

7. AUTHORIZATION

I authorize The Munder Funds and the current custodian or trustee to make the above requested distribution from my traditional IRA and use the distribution proceeds to purchase a conversion contribution into my Munder Funds Roth IRA held by BNY Mellon Investment Servicing Trust Company ("the Custodian"). I certify that no tax or legal advice has been given to me by the Custodian, The Munder Funds, or any agent of either of them, and that all decisions regarding the elections made on this form are my own. The Custodian may conclusively rely on this certification and authorization without further investigation or inquiry. I expressly assume responsibility for any adverse consequences which may arise from the election and agree that the Custodian, The Munder Funds, and their agents shall in no way be responsible, and shall be indemnified and held harmless, for any tax, legal or other consequences of the election made on this form. I understand this conversion is irrevocable. If this is a conversion from a traditional, SEP, or SIMPLE IRA held by another custodian or trustee, I understand it is my responsibility to insure the prompt conversion of assets by the current custodian or trustee. I authorize the current custodian or trustee to issue a check as indicated below.

I have read and understand and agree to be legally bound by the terms of this form.

Note: The current IRA custodian/trustee, of any non-Munder Funds accounts may require your signature to be guaranteed. Check with that institution for its requirements.

Signature

Date

Signature Guarantee: If required by current IRA custodian/trustee.

Please make checks payable to:

The Munder Funds
FBO: (Name of Individual)

Acct #:

Please mail this form and checks to:

Direct Mail
Munder Funds
P.O. Box 9701
Providence, RI 02940

Overnight Delivery
Munder Funds
4400 Computer Drive
Westborough, MA 01581