

# IRA Revocation Form



**Homestead**  
Funds

Use this form to update your account records.

Return your completed form to:

**Regular Mail**

Homestead Funds  
c/o of Ultimus Fund Solutions, LLC  
P.O. Box 46707  
Cincinnati, OH 45246

**Overnight Mail**

Homestead Funds  
c/o of Ultimus Fund Solutions, LLC  
225 Pictoria Drive  
Suite 450  
Cincinnati, OH 45246

If you have a question about the form, call us at **800.258.3030**. For complete information about Homestead Funds and services, see the prospectus, which is available at **homesteadadvisers.com** or by calling the above toll-free number.

## 1. IRA Owner Information

Account Number

Social Security Number

First Name

Middle Initial

Last Name

Residential Street Address

City

State

Zip Code

Daytime Telephone Number (in case we have questions)

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Be sure to sign this form. We cannot act on your instructions without your signature.

## 2. Revocation Information

You are allowed, under federal regulations, to revoke your IRA within seven calendar days from the date you establish your IRA. The date of the IRA is established is considered the date the IRA account is opened.

Date IRA Established (mm/dd/yyyy)

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## 3. Signature

By signing below, I am electing to revoke my IRA. A revocation entitles an IRA owner to a full return of their contribution. Homestead Funds will return all contributions without charging a penalty, service charge or administrative expenses. The amount of the deposit will be recorded on IRS Form 5498. As a result of this revocation, Homestead Funds will issue IRS Form 1099-R.

IRA Owner's Signature

Date (mm/dd/yyyy)

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