

# IRA Asset Rebalancing

✓ **Use this form to:**

- Maintain consistent allocation among your mutual fund investments within your IRA by rebalancing assets quarterly at the end of March, June, September and December if the difference is greater than 5% from the amount selected.

**Mail to:**

T. Rowe Price  
P.O. Box 17302  
Baltimore, MD 21297-1302

**Express delivery only:**

T. Rowe Price Mail Code 17302  
4515 Painters Mill Road  
Owings Mills, MD 21117-4903

This paper clip indicates you may need to attach documentation.

## 1 Account Information

Owner	Social Security Number
Day Phone	Evening Phone

## 2 Asset Allocation

Your asset allocation should not result in a balance of less than \$1,000 per mutual fund. Write "New" for account number if you are opening a new mutual fund. Check the type of IRA and provide the allocation percent desired for each fund after each rebalance occurs.

Traditional IRA  Roth IRA  Rollover IRA  Roth Rollover IRA

Fund Name	Account Number	Percent
		%
		%
		%
		%
		%
		%
		%
		%
		%
Total must equal 100%		%

For more funds, check this box and attach a separate page.

Traditional IRA  Roth IRA  Rollover IRA  Roth Rollover IRA

Fund Name	Account Number	Percent
		%
		%
		%
		%
		%
		%
		%
		%
		%
Total must equal 100%		%

For more funds, check this box and attach a separate page.

Traditional IRA  Roth IRA  Rollover IRA  Roth Rollover IRA

Fund Name	Account Number	Percent
		%
		%
		%
		%
		%
		%
		%
		%
		%
Total must equal 100%		%

For more funds, check this box and attach a separate page.

## 3 Signature

By registering for this service, I acknowledge that:

- I have authorized T. Rowe Price to automatically purchase or redeem shares quarterly from the accounts I have designated as part of the IRA Asset Rebalancing. Authorization will remain in effect until I give T. Rowe Price written notice or phone notice (if I have elected phone exchange for my IRAs) to terminate the service. My request must be received on or before the 20th of the last month of the quarter to be in effect for that quarter's rebalancing.
- I agree to be bound by the terms of the prospectus for each T. Rowe Price Fund (Fund) in which I am investing. I have the authority and legal capacity to purchase mutual fund shares and am of legal age in my state.
- IRA Asset Rebalancing is an automatic rebalancing and not an advisory service. T. Rowe Price does not make any recommendations regarding the purchase or sale of any of the funds I have selected. I understand that this investment method does not guarantee profits, nor does it assure that I will not have losses.
- Prior to the rebalancing of my accounts, T. Rowe Price will calculate for each fund account included in the IRA Asset Rebalancing the absolute value of the difference between the actual percentage and percentage I selected. If the difference is greater than 5%, the rebalancing will occur.

### Signature and Date Required

IRA Owner	Date (mm/dd/yyyy)
X	

