



Use this form to recharacterize an IRA contribution.

Mail completed form to: Lord Abbett Service Center, PO Box 219336, Kansas City, MO 64121-9336
Overnight mail: Lord Abbett Distributor LLC, 330 West 9th Street, Kansas City, MO 64105-1514
Fax: 816-843-7248 (advisors only)
Call Lord Abbett for assistance: 888-522-2388 (Monday–Friday between 8:30 a.m. and 6:00 p.m. Eastern Time)

STEP 1: ACCOUNT REGISTRATION INFORMATION

Owner Name (First Name, MI, Last Name) _____ Last 4 Digits of Social Security Number _____

Daytime Phone Number _____ Email Address _____

STEP 2: RECHARACTERIZATION

Recharacterize all or part of my annual contribution, conversion, or qualified rollover contribution, as well as any applicable earnings attributable to that contribution.

- A.** Recharacterize my account in whole.
- B.** Recharacterize my account in part, as instructed below.

	Account Number	Dollar Amount or Percentage to Convert
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

STEP 3: AUTHORIZED SIGNATURE

I understand that current account options such as systematic purchases or withdrawals will not carry over to the new account.

I also understand that the beneficiary designation and investment option(s) of the current IRA and SIMPLE accounts will apply to the new Roth Conversion IRA(s). I acknowledge also and understand that the beneficiary designation may be changed at any time by submitting a completed Beneficiary Designation Change Form and that investment options may be changed at any time by requesting a telephone exchange to another eligible Lord Abbett fund of the same class.

If this action is being taken on behalf of a minor under the laws of the shareholder’s state of residence, a parent or guardian must sign this request form. Until the age of majority is attained, the parent or guardian will exercise the powers and duties of the shareholder.

Authorized Signature _____ Date ____/____/____

Authorized Name _____