

# **ROTH IRA**

Review the following content thoroughly. Upon review, print the documents and obtain the required signatures, as applicable, to finish the request for a transfer.

OWNER INFORMATION	I	FINANCIAL ORGANIZATION INFORMATION		
Last Name	First	МІ	Financial Organization	
Tax ID	Date of Birth			
			Email	
Account Type	Account Number		~	
			Phone	
			Phone	

# Relationship to Current Account Owner

- □ I am the current account owner
- □ I am the former spouse of the current account owner
- □ I am the spouse beneficiary of the original account owner who is deceased, and I am transferring the assets to my own Roth IRA
- □ I am the spouse, non-spouse, or non-human beneficiary of the original account owner who is deceased, and I am transferring the assets to an inherited Roth IRA

CURRENT ACCOUNT INFORMATION	
Current Account Type	Current Account Owner
<ul> <li>Roth IRA</li> <li>Inherited Roth IRA</li> </ul>	Tax ID of Current Account Owner
Current Financial Organization Name/Address	Current Account Number

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TRANSFER INSTRUCTIONS		
Transfer Amount	Transfer Date	
<ul> <li>Total Amount</li> <li>Specific Amount: \$</li> </ul>	<ul> <li>Immediately</li> <li>On a specific date:</li> <li>Upon investment maturity</li> </ul>	(MM/DD/YYYY)

# Make Payable To

# as Custodian/Trustee of

## Additional Details

### INVESTMENT OPTIONS

Investment Name	Min <b>imum</b> Deposit	Dividend Rate	Annual Percentage Yield	Investment Number	Amount

#### SIGNATURE

By signing this **Transfer Request**, I certify that the information I have provided is true and correct. I authorize the current Custodian/Trustee to transfer the assets as instructed above. I understand that I am responsible for ensuring I am eligible to authorize this transfer and I assume all responsibilities for any consequences that arise as a result of my actions. I agree to indemnify and hold the Custodian/Trustee harmless from any consequences related to executing my directions. I have not received any legal or tax advice from the Custodian/Trustee and any assistance provided by the Custodian/Trustee is not to be construed as such. I also understand that if this transfer involves a SIMPLE IRA, or if I am subject to the required minimum distribution requirements, special rules apply; and I assume responsibility for my actions regarding those issues.

Print Account Owner Name	Account Owner Signature	Date		
By signing below, the Custodian/Trustee of the receiving IRA agrees to accept this transfer as instructed above.				
Print Custodian/Trustee Representative Name	Custodian/Trustee Representative Signature	Date		

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