

TRANSFER INSTRUCTIONS

Transfer Amount

- Total Amount
- Specific Amount: \$

Transfer Date

- Immediately
- On a specific date: (MM/DD/YYYY)
- Upon investment maturity

Make Payable To

as Custodian/Trustee of

Additional Details

INVESTMENT OPTIONS

Investment Name	Minimum 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