



**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 of the receiving IRA agrees to accept this transfer as instructed above.

Print Custodian/Trustee Representative Name

Custodian/Trustee Representative Signature

Date