Transfer Request

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

	1	FINANCIAL ORGANIZATION INFORMATION
First	МІ	Financial Organization
Date of Birth		
		Email
Account Number		
		Phone
	Date of Birth	Date of Birth

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 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 IRA

CURRENT ACCOUNT INFORMATION	
Current Account Type	Current Account Owner
 Traditional IRA SEP IRA SIMPLE IRA (if account owner is under age 59.5, must be 2 or more years since first SIMPLE IRA contribution was made) Inherited Traditional IRA 	Tax ID of Current Account Owner
Current Financial Organization Name/Address	Current Account Number

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

Make Payable To

as Custodian/Trustee of

Additional Details

INVESTMENT OPTIONS

Investment Name	Min imum 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		

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