



TRANSFER REQUEST

PART 1. RECIPIENT

Individual requesting the transfer

Name (First/MI/Last) _____

Date of Birth _____ Phone _____

Email Address _____

Account Number _____ Suffix _____

ACCEPTING ACCOUNT TYPE (Select one)

- Roth IRA
- Inherited Roth IRA

PART 2. ACCEPTING ROTH IRA TRUSTEE OR CUSTODIAN

To be completed by the Roth IRA trustee or custodian receiving the assets

Name _____

Address Line 1 _____

Address Line 2 _____

City/State/ZIP _____

Phone _____ Organization Number _____

Contact Name _____

PART 3. RELATIONSHIP OF RECIPIENT TO CURRENT ROTH IRA OWNER

RELATIONSHIP TYPE (Select one)

- I am the current Roth IRA owner.
- I am the former spouse of the current Roth IRA owner.
- I am the spouse beneficiary of the original Roth IRA owner transferring assets to my own Roth IRA.
- I am the beneficiary of the original Roth IRA owner transferring assets to an inherited Roth IRA.

PART 4. CURRENT ROTH IRA OWNER

Name (First/MI/Last) _____

Social Security Number _____

Account Number _____ Suffix _____

CURRENT ACCOUNT TYPE (Select one)

- Roth IRA
- Inherited Roth IRA

PART 5. CURRENT ROTH IRA TRUSTEE OR CUSTODIAN

Name _____

Address Line 1 _____

Address Line 2 _____

City/State/ZIP _____

Phone _____

PART 6. LIFE EXPECTANCY PAYMENT INSTRUCTIONS

IF YOU ARE A BENEFICIARY RECEIVING LIFE EXPECTANCY PAYMENTS, COMPLETE THE FOLLOWING.

- Distribute my life expectancy payment to me before transferring the Roth IRA assets.
- Retain my life expectancy payment amount. I understand that I am responsible for satisfying my life expectancy payment.
- Include the amount that represents my life expectancy payment in the transfer. I understand that I am responsible for satisfying my life expectancy payment.

