

IRA Form Instructions

IRA Transfer Request

Complete only the following information below:

- 1) IRA Holder's Name and Address
- 2) IRA Holder's Social Security Number
- 3) IRA Holder's Date of Birth
- 4) IRA Holder's Home Phone
- 5) IRA Account Identification (Transferring IRA)
- 6) Type of IRA
- 7) Do not complete the beneficiary instructions as they are already on the Simplifier
- 8) Transfer Instructions:
 - Directly transfer: all or part of the IRA
 - This is a: one-time request (only option)
 - The transfer should be placed in: Traditional IRA (only option)
 - The transfer: will or will not close the IRA
 - This transfer deposit: should not be placed in a conduit IRA (only option)
- 9) Asset Liquidation Instructions
 - Asset Description (ex: annuity, mutual fund, certificate of deposit, etc)
 - Quantity to be Transferred (either 100% or stated dollar amount)
 - Liquidate Immediately or Liquidate at Maturity (only options)
- 10) Transfer Instructions for Required Minimum Distribution (RMD)*
 - Select one of the three options listed
 - *RMD is only for IRA Holder's 70 ½ (this calendar year) or older
- 12) Signature and Date of IRA Holder (notary not required)