

## **IRA Form Instructions**

### Roth IRA Transfer Request

Complete **only** the following information below:

- 1) Roth IRA Holder's Name and Address
- 2) Roth IRA Holder's Social Security Number
- 3) Roth IRA Holder's Date of Birth
- 4) Roth IRA Holder's Home Phone
- 5) Roth IRA Account Identification (Transferring Roth IRA)
- 6) Do not complete the beneficiary instructions as they are already on the Simplifier
- 7) Transfer Instructions:
  - Directly transfer: all or part of the IRA
  - This is a: one-time request (only option)
  - The transfer: will or will not close the IRA
- 8) 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) Signature and Date of IRA Holder (notary not required)