

PART 1. RECIPIENT	PART 2. ACCEPTING ROTH IRA TRUSTEE OR CUSTODIAN
Individual requesting the transfer	To be completed by the Roth IRA trustee or custodian receiving the assets
Name (First/MI/Last)	Name
Date of BirthPhone	Address Line 1
Email Address	Address Line 2
Account Number Suffix	City/State/ZIP
ACCEPTING ACCOUNT TYPE (Select one)	Phone Organization Number
☐ Roth IRA ☐ Inherited Roth IRA	Contact Name
PART 3. RELATIONSHIP OF RECIPIENT TO CURRENT RO	TH IRA OWNER
RELATIONSHIP TYPE (Select one) ☐ I am the current Roth IRA owner.	
\square I am the former spouse of the current Roth IRA owner.	
☐ I am the spouse beneficiary of the original Roth IRA owner transferring	g assets to my own Roth IRA.
☐ I am the beneficiary of the original Roth IRA owner transferring assets	
PART 4. CURRENT ROTH IRA OWNER	PART 5. CURRENT ROTH IRA TRUSTEE OR CUSTODIAN
Name (First/MI/Last)	Name
Social Security Number	Address Line 1
Account Number Suffix	Address Line 2
CURRENT ACCOUNT TYPE (Select one)	City/State/ZIP
□ Roth IRA □ Inherited Roth IRA	Phone
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PART 6. LIFE EXPECTANCY PAYMENT INSTRUCTIONS	
IF YOU ARE A BENEFICIARY RECEIVING LIFE EXPECTANCY PAYMENT	NTS, COMPLETE THE FOLLOWING.
☐ Distribute my life expectancy payment to me before transferring the R	
☐ Retain my life expectancy payment amount. I understand that I am res	
☐ Include the amount that represents my life expectancy payment in the expectancy payment.	e transfer. I understand that I am responsible for satisfying my life

PART 7. TRANSFER INSTRUCTIONS		
TRANSFER OPTIONS (Select one)		
One-Time Transfer		
	Transfer Date	
	Transfer Will Close the Current Roth IRA	_
	Transfer will close the carrene nothing t	
☐ Recurring Transfer		
	Transfer Start Date	
Frequency (Select one) \square Monthly	y 🗌 Quarterly 🗌 Semi-Annually 🗎 Annu	aally \square Other
MAKE PAYABLE TO (If the accepting I owner.)	RA type is an inherited Roth IRA, the Name of Red	cipient must identify both the recipient and the original Roth IRA
		as \square Trustee or \square Custodian of
Name of	Accepting Roth IRA Trustee or Custodian	
		Roth IRA
	Name of Recipient	
ASSET HANDLING (Investments ident	ified below will be liquidated immediately unle	ss otherwise specified in the Special Instructions section.)
Asset Description	Amount to be Transferred	Special Instructions
, 2	7	
PART 8. SIGNATURES		
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responsible for determining that this Ro	oth IRA transfer qualifies under the rules that a nces that may result from this transfer and I ag	d by me is true and accurate. I understand that I am pply to such transfers and agree to comply with those rules. I tree that the trustee or custodian is not responsible for any
The trustee or custodian signing below	agrees to accept the assets being transferred.	
X		
Signature of Recipient		Date (mm/dd/yyyy)
X		
Notary Public/Signature Guarantee (If requir	ed by the trustee or custodian)	Date (mm/dd/yyyy)
X		
Authorized Signature of Accepting Trustee or Custodian		Date (mm/dd/yyyy)