



PO Box A3535
Chicago, IL 60690

Phone: 312-795-0988
www.IRAclub.org

Recharacterization Instructions

This form provides the information to authorize a Recharacterization from a ROTH IRA to a Traditional IRA. **The IRA Club fee to process this request is \$15.**

Account Owner Information

ROTH IRA Account Number: _____

First and Last Name: _____

Social Security Number: _____ Phone Number: _____

Recharacterization Instructions

Date of Initial ROTH Conversion: _____

Full Recharacterization Partial Recharacterization: Amount to Recharacterize \$ _____

Traditional IRA Account Number (if available): _____

CASH In-Kind Asset and CASH

If other than cash:

Asset: _____ Fair Market Value: _____

Asset: _____ Fair Market Value: _____

Authorization

I authorize the IRA Club to process a Recharacterization of my ROTH IRA to a Traditional IRA as instructed above. By signing below, I assume full responsibility for any tax consequences that may arise as a result of this request. No tax advice was given by The IRA Club and all of the decisions are my own. Lastly, I understand that The IRA Club is required to report this transfer. The account owner is solely responsible for reporting this information on IRS Form 8606 if applicable. The IRA Club recommends the account holder to seek advice from a professional tax advisor or the IRS to be sure the account holder qualifies for this Recharacterization. This request cannot be revoked.

Signature: _____ **Date:** _____

For Office Use Only:

Email	Fax
newaccounts@IRAclub.org	888-600-6997

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