



PO Box A3535  
Chicago, IL 60690

Phone: 888-795-7950  
www.IRAclub.org

# IRA to IRA Transfer Request Form

This form provides the information to request funds from an IRA at another firm. DO NOT complete this form if you need to transfer a 401k, 403b or other tax exempt employment retirement plan. Please follow the instructions on our 401k Transfer Guide.

## Account Owner Information

First and Last Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

IRA Club Account Number: \_\_\_\_\_ IRA Club Account Type: \_\_\_\_\_

## Account to Transfer From

My current IRA is:  Traditional  ROTH  SEP  SIMPLE  an Inherited IRA

Name of Firm: \_\_\_\_\_ Account Number: \_\_\_\_\_

Firm Address: \_\_\_\_\_

Firm Phone: \_\_\_\_\_

## Transfer the following to my IRA Club Account

All Available Cash. (Make sure you provided liquidation instructions to your firm.)

Exactly \$ \_\_\_\_\_ in cash only.

The following asset(s) in kind: \_\_\_\_\_  
(Asset Name, Type and Approximate Value)

## Other Special Instructions

\_\_\_\_\_  
\_\_\_\_\_

Please mail this completed form to us for processing.

Overnight address: 67 E. Madison St. Suite 1510

Chicago, IL 60603

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**Delivery Instructions for Cash**

Please choose one. How would you like the funds sent to IRA Club?

- Check by Regular Mail
- Wire Transfer (Incoming fee applies.)

**Client Authorization**

By signing below, I instruct my current IRA provider to transfer the described funds and or assets to The IRA Club.

**Account Owner Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

For Internal Use Only

**Authorized Transaction**

Medallion Signature Guarantee

Approximate Account Transfer Value:

\_\_\_\_\_

This stamp guarantees the IRA Club signor.

IRA Club Acceptance: We accept the above described assets FBO client listed above.  
(Tax ID 20-5332361)

Authorized IRA Club Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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