



PO Box A3535
Chicago, IL 60690
www.iraclub.org
312-795-0988

IRA TO IRA TRANSFER REQUEST

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. Instead, follow the instructions on the 401k Transfer Guide.

1. ACCOUNT OWNER INFORMATION

FULL NAME	IRA CLUB ACCOUNT NUMBER AND TYPE OF IRA
SOCIAL SECURITY NUMBER	PHONE NUMBER

2. ACCOUNT TO TRANSFER FROM

FIRM NAME	ACCOUNT NUMBER	TYPE OF IRA
FIRM ADDRESS		
FIRM PHONE NUMBER	FIRM FAX NUMBER	

3. TRANSFER THE FOLLOWING TO MY IRA CLUB ACCOUNT

<input type="checkbox"/> TRANSFER ALL AVAILABLE CASH	<input type="checkbox"/> TRANSFER EXACTLY \$ _____ IN CASH
<input type="checkbox"/> TRANSFER THE FOLLOWING ASSET(S) IN KIND: _____	
<input type="checkbox"/> CHECK HERE IF THIS IS A PARTIAL TRANSFER OF THE ACCOUNT	

4. OTHER SPECIAL NOTES

5. DELIVERY INSTRUCTIONS FOR CASH

CHECK BY REGULAR MAIL TO:

IRA CLUB
ATTN: DEPOSITS
67 E. MADISON ST. SUITE 1510
CHICAGO, IL 60603

SEND A WIRE TRANSFER

(SEE THE IRA CLUB LETTER OF ACCEPTANCE FOR WIRE INSTRUCTIONS.)

FAX TO 312-283-2615 EMAIL: TRANSFERS@IRAklub.org

OVERNIGHT: 67 E. MADISON ST.
SUITE 1510
CHICAGO, IL 60603



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6. CLIENT AUTHORIZATION

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

APPLICANT SIGNATURE	DATE SIGNED
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FOR IRA CLUB USE ONLY

TRANSACTION AUTHORIZATION

MEDALLION SIGNATURE GUARANTEE

APPROXIMATE ACCOUNT TRANSFER VALUE:

MEDALLION GUARANTEES THE IRA CLUB SIGNOR

**IRA CLUB ACCEPTANCE: WE ACCEPT THE ABOVE DESCRIBED CASH AND/OR ASSETS FOR THE BENEFIT OF THE CLIENT LISTED ON THIS TRANSFER REQUEST.
 (TAX ID 20-5332361)**

AUTHORIZED IRA CLUB SIGNATURE	DATE SIGNED
NAME OF SIGNOR	TITLE OF SIGNOR



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FIRM	DELIVERY INSTRUCTIONS OF THIS REQUEST TO IRA CLUB
American Funds	Mail original
Ameriprise	Mail original
Charles Schwab	Fax or Email
Chase	Mail original
E*Trade	Fax or Email
Edward Jones	Fax or Email
Equity Trust	Fax or Email
The Entrust Group	Mail original
Fidelity	Fax or Email
Interactive Brokers	Mail original
JP Morgan	Mail original
LPL Financial	Fax or Email
Merrill Lynch	Mail original
MetLife	Fax or Email
Millennium Trust	Mail original
Morgan Stanley	Mail original
National Financial	Mail original
Northwestern Mutual	Mail original
Oppenheimer Funds	Mail original
Options Xpress	Fax or Email
Pershing, LLC	Mail original
Primerica	Mail original
Prudential	Mail original
Raymond James	Fax or Email
Scottrade	Mail original
Summit Trust Co.	Mail original
TD Ameritrade	Fax or Email
TROWE Price	Mail original
UBS Financial	Mail original
USAA	Fax or Email
Vanguard	Mail original
Voya	Mail original
Waddell & Reed	Fax or Email
Wells Fargo	Mail Original

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