



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

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, 40s or other tax exempt employment retirement plan. Instead, follow the instruction on the 401k Transfer Guide.

1. Account Owner Information

First and Last Name: _____

IRA Club Account Number: _____ IRA Club Account Type: _____
Ex: Traditional IRA

SSN: _____ Daytime Phone: _____

2. Account to Transfer from

Name of Firm: _____ Account Number: _____
Ex: 477474, ROTH IRA

Firm Address: _____

Firm Phone: _____ Firm Fax: _____

3. Transfer the following to my IRA Club account

- All Available Cash Exactly \$ _____ in cash only.
- The following asset(s) in kind: _____

4. Other Special Instructions

5. Delivery Instructions for Cash

- Check by Regular Mail to:** **Send a Wire Transfer**
(See the IRA Club Letter of Acceptance for instructions.)
- IRA Club
 Attn: Deposits
 PO Box A3535
 Chicago, IL 60690

Continued on next page.



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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.

Signature: _____ **Date:** _____

7. Transaction Authorization (to be completed by IRA Club)

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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| 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 |

Fax to 312-283-2615

Email: transfers@iraclub.org

Overnight: 67 E. Madison St.
Suite 1510
Chicago, IL 60603