



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: \_\_\_\_\_ Firm Fax: \_\_\_\_\_

## 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

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

Email	Fax
<a href="mailto:transfers@IRAclub.org">transfers@IRAclub.org</a>	888-600-6997

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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.)

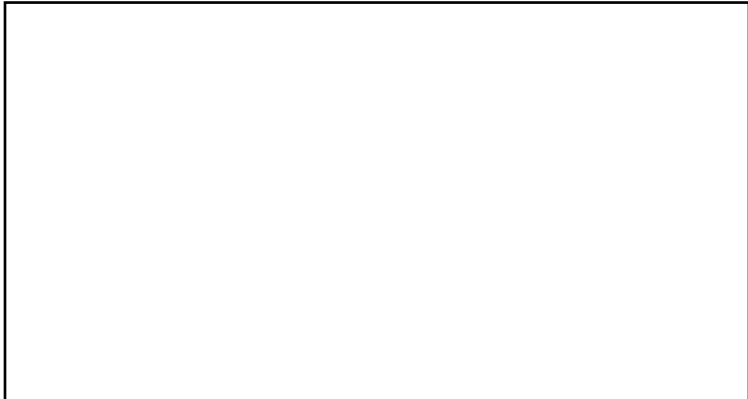
**Client Authorization**

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:** \_\_\_\_\_

**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: \_\_\_\_\_

Email	Fax
<a href="mailto:transfers@IRAclub.org">transfers@IRAclub.org</a>	888-600-6997

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

Email	Fax
<a href="mailto:transfers@IRAclub.org">transfers@IRAclub.org</a>	888-600-6997