

Partial Transfer Out

To transfer funds to an existing retirement account:

1. Double-check that the account you want to transfer to is the same tax type.
2. Complete *that custodian's* IRA Transfer Request Form.
3. Return the paperwork to the correct department or your advisor at the receiving firm. They will countersign it with a medallion signature guarantee and forward the paperwork to IRA Club. If this is a partial transfer, please keep in mind that we require a \$500 minimum cash balance in your account.

To rollover funds to an existing 401k or another employer plan:

1. Complete our [Distribution Request Form](#).
2. After you receive the funds from IRA Club, you will have 60 days to send the funds to another retirement account.
3. A form 1099-R (distribution) will be triggered if you do not complete this within 60 days.

Any assets being transferred need to be re-titled to the new custodian. A title company can help you with real estate assets. For loans, the promissory note will need to be amended. Please contact your investment provider for any other information or assistance.

For further assistance, feel free to reach out to us with any questions.

Sincerely,
Transfers Department