



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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