

**PLEASE NOTE:** This form provides the information for IRA Club to request funds from an IRA at another firm. DO NOT complete this form if you need to rollover a 401(k), 403b or other qualified retirement plan. Instead, follow the instructions on our Rollover Guide. Please submit a copy of the other firm's IRA account statement with this form.

**1. IRA CLUB ACCOUNT INFORMATION**

CLIENT FULL NAME	
SOCIAL SECURITY NUMBER	IRA CLUB ACCOUNT NUMBER AND TYPE OF IRA
PHONE NUMBER	EMAIL ADDRESS <sup>1</sup>

**2. DELIVERING FIRM INFORMATION<sup>ii</sup>**

FIRM	ACCOUNT NUMBER
FIRM ADDRESS	ACCOUNT TYPE
PHONE NUMBER	FAX NUMBER

**3. TRANSFER INFORMATION**

TRANSFER <b>ALL AVAILABLE CASH</b>	TRANSFER EXACTLY \$ _____ IN CASH
TRANSFER <b>THE FOLLOWING ASSET(S) IN KIND:</b> _____	
OTHER SPECIAL <b>NOTES:</b> _____	

**4. DELIVERY INSTRUCTIONS FOR CASH**

**CHECK BY REGULAR MAIL TO:**

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

**SEND A WIRE TRANSFER TO IRA CLUB**

SEE IRA CLUB LOA FOR INSTRUCTIONS

**5. CLIENT AUTHORIZATION AND SIGNATURE**

By signing below, I instruct my current IRA provider to transfer the described funds and/or assets to IRA Club. I understand it is my responsibility to contact my current financial IRA provider to confirm the liquidation requirements.

ACCOUNT OWNER SIGNATURE	DATE SIGNED
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**QUESTIONS?** We are available via phone Monday-Friday between 9:00AM-5:00PM CST. Call 312-795-0988.

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**FOR IRA CLUB USE ONLY**

**IRA Club Acceptance:** We accept the above described cash and/or assets for the benefit of the client listed on this Non ACAT IRA Transfer Request form.

**APPROXIMATE TRANSFER VALUE \$** \_\_\_\_\_

MEDALLION SIGNATURE GUARANTEE  
GUARANTEES THE IRA CLUB SIGNOR  
TAX ID 20-5332361

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

<sup>i</sup> Your email address will be used to communicate information as it relates to this account.

<sup>ii</sup> A minimum cash balance of \$500 must be deposited to keep the account active.



PO Box A3535  
Chicago, IL 60690  
[www.iraclub.org](http://www.iraclub.org)  
312-795-0988

<b>FIRM</b>	<b>DELIVERY INSTRUCTIONS OF THIS REQUEST TO IRA CLUB</b>
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

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