IRA Services Trust Company

TRANSFER AUTHORIZATION

A transfer occurs when you authorize your current IRA custodian/ trustee to transfer assets from your existing IRA to your IRA Services IRA. You may only transfer cash and acceptable assets to your IRA Services IRA. Therefore, any non-acceptable assets at your existing custodian/trustee must be liquidated and delivered in cash. This form authorizes a direct transfer of cash and acceptable assets from your current custodian/trustee to IRA Services Trust Company for deposit into your IRA Services IRA.

Transfer Authorization Instructions

- Complete Sections A and B
- Send form to:

  IRA Services
  PO Box 7080
  San Carlos, CA 94070-7080
- IRA Services will forward to your current custodian with a letter of acceptance

  You may contact us at 650-593-2221

Custodial Use Only

Please Complete Sections A and B

A. Current Plan Information

Name of Participant	Social Security Number
Name of Plan Being Transferred	Plan Account Number
Name of Current Custodian/Trustee	Current Custodian/Trustee Contact Name
Current Custodian/Trustee Address	Current Custodian/Trustee Contact Telephone

Current Custodian/Trustee: City State Zip Code

Type of Plan being transferred (check one)

◯ **Coverdell Education Savings Account**

◯ **Traditional IRA** ◯ **Roth IRA** ◯ **SEP IRA** ◯ **SIMPLE IRA** ◯ **Other:**_____

B. Assets to be Transferred - You MUST attach a copy of a recent statement

◯ **Transfer ALL available Cash** **OR** ◯ **Transfer exactly** **$** _____.____

If you wish to liquidate assets and transfer cash, you MUST provide your current custodian with liquidation instructions and then have them transfer the cash

◯ **Transfer ALL Assets in kind** **(You MUST attach a copy of a recent statement)**

◯ **Transfer the following Assets in kind:** **(Attach additional pages if necessary)**

Asset/Security Name	Number of Shares	Estimated Value
		$.__
		$.__

Delivery Instructions: (Please check one)

◯ **Make Check(s) payable to:**

IRA Services Trust Company, Custodian

Mail checks or "In Kind" Asset documents to:

IRA Services, PO Box 7080, San Carlos, CA 94070-7080

Be sure to show participant name and OUR Account Number on check

◯ **Wire Funds to:**

Institution Name: ***Fremont Bank***
Beneficiary Account Name: ***IRA Services***
Routing Transit #(ABA): ***121107882***
Beneficiary Account #: ***19902328***
For Further Credit: ***[fbo: Participant Name & OUR Account No.]***

The appointment of IRA Services Trust Company as custodian will become effective upon receipt of those assets from the prior custodian/trustee. IRA Services Trust Company assume no liability for the action or inaction of the prior custodian/trustee as to the proper and timely transfer of the funds.

_____ _____/_____/_____

Signature of IRA Participant **Date**

Signature Guarantee (Applicable only if required by participant's current custodian/trustee in order to liquidate assets.)

FOR CUSTODIAL USE ONLY

IRA Services Trust Company accepts its appointment as Custodian

_____ _____/_____/_____

Authorized Signature (TIN 26-2627205) Date

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