



Use this form to notify IRA Services of any slight discrepancies in the way your name is listed on your IRA Services account and the account from which your assets are being transferred (“Delivering Account”). For complete name changes, such as due to marriage or divorce, complete the Name Change form and include the appropriate legal documents such as a marriage certificate or divorce decree.

1. ACCOUNT OWNER (*required field)

Should IRA Services need to contact you in regards to this request, your preferred method of contact is:

- Email
- Primary Phone

Examples of Alternate Name: nickname; alternate spelling; Jr./Sr.; or use of initials.

Name on IRA Services Account

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

Name on Delivering Account

Name

2. SIGNATURE AND DATE (Account owner must sign and date)

You must sign your name both ways. You may be required to obtain a Medallion Signature Guarantee for each signature. Please check with your current financial institution for their requirements. You can get a Medallion Signature Guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a signature guarantee.

By signing below, you:

- Certify that the two names indicated above refer to one and the same person.
- Authorize IRA Services to accept transactions under either name.

Name and Signature on IRA Services Account

▼ Medallion Signature Guarantee ▼

Owner Name
Date (MM/DD/YYYY)
Owner Signature X

Name and Signature on Delivering Account

▼ Medallion Signature Guarantee ▼

Owner Name
Date (MM/DD/YYYY)
Owner Signature X

Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
transfers-in@IRAServices.com

Fax
(650) 745-2907

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

Overnight mail
IRA Services
1160 Industrial Road, Unit 1
San Carlos, CA 94070-4128