

Please Print or Type

 TO: _____
 Current IRA Trustee or Custodian

 Account Number at Current Institution

Please transfer the indicated amount from the IRA or qualified retirement plan (QRP) you are maintaining on my behalf to the IRA I have established at my credit union. Make the check payable to the credit union named below and note on the check that it is for deposit to Account Number _____ at the credit union.

Type of Transfer:

- Traditional IRA to Traditional IRA
 Traditional IRA to Roth IRA*
 Roth IRA to Roth IRA
 Qualified Retirement Plan to Traditional IRA*

*NOTE: The RMD for the year of transfer must be paid to the owner before the transfer is completed.

IDENTIFYING INFORMATION

 IRA Owner's Name (First, Initial, Last)

 Credit Union Name

 _____ - _____ - _____ - _____
 Social Security Number IRA Suffix

 Mailing Address

 CUID (Credit Union will Complete)

 City, State, ZIP

 ()

 Phone Number

 Contact Person

CREDIT UNION'S SIGNATURE

An IRA has been established at our credit union to receive this transfer.

 Credit Union's Signature

 Date (MM/DD/YYYY)

DETAILS OF TRANSFER

Check one in each column

Amount

Transfer:

1. \$ _____
 2. The entire amount in my IRA and close my account.

Date

Make this transfer:

1. On _____
 Date (MM/DD/YYYY)
2. Immediately.
 3. At maturity.

IRA OWNER'S SIGNATURE

 X

 IRA Owner's Signature

 Date (MM/DD/YYYY)