

**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** \_\_\_\_\_  
IRA Owner's Signature\_\_\_\_\_  
Date (MM/DD/YYYY)