



Account Transfer Form

PO Box 9
Cedar City, UT 84721
Phone: 888-328-8008
Fax: 435-867-1042

Part 1 Account Owner Information

NAME (as it appears on your account application)	IRA EXPRESS ACCOUNT NUMBER	SOCIAL SECURITY NUMBER
EMAIL ADDRESS		DAYTIME PHONE NUMBER

Part 2 Account Information and Compatibility

You must transfer to a compatible type of an account. Please contact IRA Express if you have questions regarding account compatibility.

Account Type Being Transferred	Transferring to IRA Express Account Type
<input type="checkbox"/> Traditional IRA <input type="checkbox"/> SEP IRA <input type="checkbox"/> Beneficiary IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SIMPLE IRA	<input type="checkbox"/> Traditional IRA <input type="checkbox"/> SEP IRA <input type="checkbox"/> Beneficiary IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SIMPLE IRA

Part 3 Current Custodian Information

Please include a copy of your current statement for the account that is being transferred.

CUSTODIAN NAME		ACCOUNT NUMBER
ESTIMATED TRANSFER VALUE	ADDRESS	CITY, STATE, ZIP
PHONE	FAX	CONTACT PERSON

Part 4 Transfer Instructions

- If you would like to transfer your full account as cash please contact your current Trustee/Custodian to initiate the liquidation process.
- The term "liquidate all assets and transfer proceeds" will result in all assets being sold and the cash proceeds being forwarded to IRA Express.
- A transfer "in-kind" refers to the re-registration of physical assets from the prior Trustee/Custodian's name to IRA Express.
- If you are only performing a partial transfer to your IRA Express account please list all assets to be liquidated or transferred in-kind in the spaces provided and mark the appropriate box.
- Please include a copy of a recent statement (dated within 6 months) from your current Trustee/Custodian.

Type of Transfer: (check one)

<input type="checkbox"/> FULL TRANSFER <i>Please Liquidate all assets and transfer the proceeds to IRA Express, Inc. as agent for Custodian for the benefit of [Client's Name and IRA Number].</i>	<input type="checkbox"/> TRANSFER ALL ASSETS IN-KIND <i>Please transfer all assets in-kind to IRA Express, Inc. as agent for Custodian for the benefit of [Client's Name and IRA Number].</i>	<input type="checkbox"/> PARTIAL TRANSFER <i>Please transfer the following assets described below to IRA Express, Inc. as agent for Custodian for the benefit of [Client's Name and IRA Number].</i>
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PARTIAL TRANSFERS ONLY Description of Assets (cash, real estate, LLC, etc.)	QUANTITY (All, # of shares, or Value)	INSTRUCTIONS (Please check on box per asset)
1.		<input type="checkbox"/> CASH ONLY
2.		<input type="checkbox"/> LIQUIDATE or <input type="checkbox"/> IN-KIND
3.		<input type="checkbox"/> LIQUIDATE or <input type="checkbox"/> IN-KIND
4.		<input type="checkbox"/> LIQUIDATE or <input type="checkbox"/> IN-KIND
5.		<input type="checkbox"/> LIQUIDATE or <input type="checkbox"/> IN-KIND

Part 5 Delivery Instructions

How would you like your current trustee/custodian to deliver your assets to IRA Express?

<input type="checkbox"/> INCOMING WIRE TRANSFER	<input type="checkbox"/> BY CHECK MAILED TO IRA EXPRESS
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Part 6 Account Owner Signature and Acknowledgement

1. I hereby agree to the terms and conditions set forth in this Account Asset Transfer Authorization and acknowledge having established an IRA Express self-directed account.
2. I understand the rules and conditions applicable to an Account Transfer. I understand that it is my responsibility to contact my current financial institution to determine whether a medallion guarantee is required. If a medallion guarantee is required, it is my responsibility to take this Form to my bank or credit union for a medallion guarantee. (Failure to obtain a medallion guarantee could result in delays and/or rejection of this request by your current financial institution)
3. I qualify for the account transfer of assets listed in Part 4 and authorize such transactions.
4. I understand that no one at IRA Express has authority to agree to anything different than my foregoing understandings of IRA Express policy.

Medallion Signature Guarantee Stamp

SIGNATURE

DATE

FOR OFFICE USE ONLY - Acceptance of Receiving Custodian

Pursuant to a limited written delegation, the Custodian has authorized IRA Express, Inc. to serve as the Administrator for the Custodian and to sign this form on the Custodian's behalf. The Custodian ASSUMES NO INVESTMENT CONTROL OVER CLIENT FUNDS AND ACTS ONLY AS A CUSTODIAN FOR CLIENT FUNDS. The Custodian assumes no investment management or investment fiduciary obligations.

IRA Express, Inc., as agent for Custodian, Fortis Bank:

AUTHORIZED SIGNATURE, IRA EXPRESS, INC.: _____ DATE: _____

Regular Mail Delivery Address	Overnight Mail Delivery Address	Incoming Wire Transfer Information
IRA Express, Inc. as Agent for Custodian FBO [Account Holder Name and Account #] PO BOX 9 CEDAR CITY, UTAH 84721	IRA Express, Inc. as Agent for Custodian FBO [Account Holder Name and Account #] 74 NORTH MAIN STREET CEDAR CITY, UTAH 84720	PLEASE REFERENCE THE ENCLOSED WIRING INSTRUCTIONS