



# Roth Conversion 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 in your plan)	IRA EXPRESS ACCOUNT NUMBER	ACCOUNT TYPE BEING CONVERTED
EMAIL ADDRESS		PHONE NUMBER

## Part 2 Conversion Information

Choose one of the following:

<input type="checkbox"/> NEW ROTH IRA <i>This is a conversion to a NEW Roth IRA. An account application must be attached to set-up your new Roth IRA.</i>	<input type="checkbox"/> EXISTING ROTH IRA <i>This is a conversion to an EXISTING Roth IRA. Existing Roth IRA Account Number: _____</i>
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Choose one of the following:

<input type="checkbox"/> FULL CONVERSION <i>Convert all the assets held in the above account.</i>	<input type="checkbox"/> PARTIAL CONVERSION <i>Convert only the assets listed below.</i>
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Asset Description	Indicate Dollar Amount (do not use percentages)

**A Fair Market Valuation (FMV) Form must be filled out (including supporting documentation) for each asset being converted.**

## Part 3 Certification and Acknowledgement

- I certify that the information provided is true and correct to the best of my knowledge.
- I certify that no tax advice has been given to me by the Administrator or Custodian.
- This conversion is being made within 60 days after my receipt of funds from my Traditional IRA plan or Employer Sponsored plan, if applicable.
- I hereby irrevocable elect, to treat this transaction as a conversion as permitted under the IRS Regulations.
- It is recommended that I consult with my tax advisor before completing this transaction.
- I acknowledge that the distribution and conversion transactions will be reported to the IRS.
- I acknowledge that this conversion will be taxed in the calendar year it is completed.
- I expressly assume the responsibility for any adverse consequences which may arise from this conversion request and I agree that the Administrator and/or Custodian shall in no way be responsible for those consequences.
- I hereby release the Administrator and/or Custodian from any claim for damages on account of the failure of this transaction to qualify as a valid conversion.

**Please read the disclosure above the signature line before signing and dating.**

SIGNATURE	DATE
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