



IRA Transfer form

Account Holder Information

Full Name _____ Social Security Number _____
Phone # _____ Date of Birth _____ Address _____
City _____ State _____ Zip _____

Prior Custodian/Trustee Account Info

Name: _____ Phone: _____ Fax: _____

Address: _____ City: _____ State: _____ Zip: _____

Account Number: _____ Account Type: [] Traditional [] Roth [] SEP [] SIMPLE

Transfer Instructions

Liquidate and transfer _____ % . From the indicated account, or send \$ _____

via [] Wire or [] Check To: Sunwest Trust Inc.
Attention: IRA Department
P.O. BOX 36371
Albuquerque, NM 87176-6371

[] Transfer the following Assets In Kind: _____

I hereby certify by my signature, that my information is true and correct, and that I understand if I have required minimum distributions, it is my responsibility to remove them required amount from an IRA before the deadline. If Applicable, I acknowledge and confirm the transfer of my Simple IRA into My non Simple IRA is at least two years after the date I first received a contribution into the Simple IRA.

Signed This _____ day of _____, _____
Month year

Signature of accountholder _____

Acceptance

We will accept the above captioned account as successor custodian

Custodian Acknowledges receipt _____ day of _____, _____
Month year

Custodian Signature _____