



Non-ACAT Transfer Request

► Email to: transfers@iraclub.com

Reminder: IRA Club requires all accounts to maintain a minimum balance of \$500.

Please provide your current IRA administrator with liquidation instructions prior to submitting this form.

1. IRA CLUB ACCOUNT OWNER

The name on the account you are transferring must be identical to the name on your IRA Club account. If they are not the same, you may need to provide proof of name change (a marriage certificate, divorce decree, etc.)

FULL LEGAL NAME	SOCIAL SECURITY NUMBER	IRA CLUB ACCOUNT NUMBER
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2. DELIVERING FIRM INFORMATION

You must submit a copy of the delivering firm's account statement with this request.

FIRM NAME / CUSTODIAN NAME	ACCOUNT NUMBER
ADDRESS	ACCOUNT TYPE / REGISTRATION
PHONE NUMBER	FAX NUMBER

3. TRANSFER INSTRUCTIONS

I am aware of IRA Club's \$500 minimum cash balance requirement.

I am confirming all funds being transferred are held in a cash position.

<input type="checkbox"/> Full Cash Transfer	<input type="checkbox"/> Partial Cash Transfer of \$ _____
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4. DELIVERY INSTRUCTIONS FOR CASH

Physical Checks by Regular Mail

IRA Club
67 E Madison St
Suite 1510
Chicago, IL 60603

NOTE: funds received via check are available in 3 business days

Fedwire® Instructions for Cash

Meridian Bank, Malvern, PA
ABA # 031918828
Account # 4024840
FBO: IRA Club, LLC
Reference: IRA Club Account #

5. CLIENT AUTHORIZATION AND SIGNATURE

By my signature below,

- I instruct my current IRA administrator to transfer the described funds to IRA Club as successor administrator.
- I assume sole responsibility for determining the eligibility for rollover distributions from another qualified plan or retirement account, whether performed as a trustee-to-trustee transfer or indirect rollover.



ACCOUNT OWNER'S SIGNATURE	DATE SIGNED
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