



**Real Choice. Real Control. Real Wealth.**

**1. IRA PARTICIPANT INFORMATION**

Legal Name:

Address:

City, State, Zip:  Phone Number:

Social Security #:  Date of Birth:

**2. TYPE OF ACCOUNT TO BE CONVERTED**

Traditional IRA

SEP IRA

SIMPLE IRA

Employer-Sponsored Plan

ACCOUNT # TO BE CONVERTED

CREATE NEW ROTH ACCOUNT (Attach Completed Roth IRA Application)

CONVERT TO EXISTING ROTH ACCOUNT #

**3. CONVERSION INSTRUCTIONS**

Full Conversion—Convert all assets “in-kind” together with cash balance to Roth account.

Partial Conversion—Convert the following amount in cash to Roth account: \$ \_\_\_\_\_

Partial Conversion—Convert the asset (s) specified below to Roth account.

**(Additional documentation may be required before assets can be converted.)**

Description of Asset:	Fair Market Value*	Interest to be Converted

**\*Fair Market Value of Asset must be provided with supporting documentation.**

**4. SIGNATURE**

I hereby certify, acknowledge and agree as follows:

- 1.) That I have been advised to seek the advice of independent legal and tax professionals prior to entering into this Roth Conversion Directive.
- 2.) That I have or will establish a Roth IRA with RealTrust IRA Alternatives, LLC (Administrator) in order to accommodate the instant Roth Conversion.
- 3.) That I am responsible to determine whether I am eligible to initiate the instant Roth Conversion and that such Conversion qualifies as a valid rollover contribution to my Roth Account.
- 4.) That I am responsible for obtaining a valid Fair Market Valuation of the asset(s) converted to my Roth Account and providing such valuation to Administrator.

By signing below, I hereby waive any and all claims, causes of action and/or liability that may arise as against and hereby release and hold Administrator and Custodian harmless from any such claims, causes of action & liability that may arise as a result of entering into this Roth Conversion Directive upon the terms hereof.

IRA PARTICIPANT’S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_