



# ROTH CONVERSION DIRECTIVE

Real Choice. Real Control. Real Trust.

## 1. PARTICIPANT INFORMATION

Legal Name:

Address:

City, State, Zip:  Phone Number:

Soc. Sec. No.:  Date of Birth:

## 2. TYPE OF ACCOUNT TO BE CONVERTED

- Traditional IRA     SEP IRA     SIMPLE IRA     Employer-Sponsored

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:

- That I have been advised to seek the advice of independent legal and tax professionals prior to entering into this Roth Conversion Directive.
- That I have or will establish a Roth IRA with RealTrust IRA Alternatives, LLC (Administrator) in order to accommodate the instant Roth Conversion.
- 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.
- That I am responsible for obtaining a valid Fair Market Valuation of the asset(s) converted to my Roth account and provide 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.

PARTICIPANT'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_