



**1. PARTICIPANT INFORMATION**

Participant:

Address:

Social Sec. No:  Account No:

Current Custodian:

Address:

Contact Name:  Phone Number:

\*PLEASE INCLUDE LEGIBLE COPY OF YOUR CURRENT ACCOUNT STATEMENT WITH THIS FORM.

**2. FORM OF TRANSFER**

I AM TRANSFERING FROM:  Traditional IRA  Roth IRA  SEP IRA  SIMPLE IRA

I AM TRANSFERING TO:  Traditional IRA  Roth IRA  SEP IRA  SIMPLE IRA

THIS IS A:  COMPLETE TRANSFER  PARTIAL TRANSFER OF MY ACCOUNT

Liquidate all assets and transfer proceeds to RealTrust  Send \$\_\_\_\_\_ in cash to RealTrust

Transfer all assets "in-kind" along with cash  Transfer \_\_\_\_\_.

SEE COVER LETTER FOR DELIVERY INSTRUCTIONS

**3. SIGNATURES**

I understand that if this transfer is occurring during or after the calendar year during which I attain the age of 70½, the required minimum amount determined under this IRA is still required to be distributed. I further understand that the current Trustee/Custodian is not responsible for making this distribution prior to the transfer. I accept full responsibility for satisfying the required minimum distribution applicable to this IRA by withdrawing sufficient amounts from another IRA prior to the deadline for receiving minimum distributions for the calendar year of the transfer. If this transfer leaves the transferor IRA in one year but does not reach the transferee IRA until the following year, I understand that this will be an "outstanding transfer" as of December 31<sup>st</sup>. The new IRA must "deem" that the transfer was received as of the prior December 31<sup>st</sup> for determining any required minimum distribution from the transferee IRA for the year that the transfer was received. I will inform the transferee IRA Trustee/Custodian of any such outstanding transfer.

The transfer amount  should  should not be placed in a separate ("conduit") IRA. New IRA Account: \_\_\_\_\_  
I understand that commingling regular IRA contributions with previously rolled assets from an employer plan may preclude me from subsequently rolling over funds from my rollover "conduit" IRA into another qualified plan or 403(b) plan. With such knowledge, I authorize and direct the Administrator/Custodian to place these transferred Traditional IRA contribution assets in my rollover "conduit" IRA or visa versa. I acknowledge that certain transfers may be required to be reported to the IRS.

Participant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Accepting Organization - Our organization agrees to serve as the Administrator for the new Custodian for the IRA account of the above-named individual, and as Administrator for the new Custodian, we agree to accept the assets being transferred hereunder.

RealTrust IRA Alternatives, LLC on behalf of the Custodian,

By: \_\_\_\_\_ Date: \_\_\_\_\_  
\_\_\_\_\_, Its Authorized Signatory