

Return to: IRA Services

ROLLOVER AUTHORIZATION

IRA owner's name (member)

member account number

amount of rollover**(Irrevocable Tax Treatment)**

Internal Revenue Service Regulations require that a statement signed by the account owner be kept on file at the receiving institution regarding all rollovers. Please complete this form if you are going to rollover a distribution from an IRA or Qualified Retirement Plan to your Credit Union IRA, or from a Coverdell Education Savings Account (ESA) to a Coverdell ESA. Distributions from a Qualified Retirement Plan to a **Traditional IRA**, are not subject to 20% withholding if the check is made payable to: Alliant Credit Union for deposit into your IRA.

The election to rollover funds from a Qualified Retirement Plan to a Credit Union Traditional IRA is irrevocable. Rollover of these funds at a later date to another Qualified Retirement Plan is permitted.

The rollover deposit must be made to the account within 60 days from the date you receive the disbursement. The Credit Union must receive this form within 30 days following the date of deposit, or the funds will be withdrawn and returned to you. If you are opening a new IRA or Coverdell ESA at the Credit Union with this deposit, you must also complete an IRA application and beneficiary form or Coverdell ESA application and receive additional disclosures and agreements. Please visit your nearest Service Center or call (800) 328-1935 (M-F, 7:00am to 7:00pm CT) to obtain these documents.

Check one box only.

This rollover contribution is all or part of a distribution from another IRA or Coverdell ESA owned by me or my deceased spouse, which was disbursed during the past 60 days. During the last 12 months, I have not received any assets from this account which I subsequently rolled over to another IRA or Coverdell ESA. Traditional IRA required minimum distributions paid to persons over age 70 1/2 are not eligible for rollover.

- Rollover from a Traditional IRA to a Traditional IRA.
- Rollover from a Roth IRA to a Roth IRA.
- Rollover from a Coverdell ESA to a Coverdell ESA.

A Qualified Retirement Plan is any pension plan, profit-sharing plan, stock bonus plan, Keogh plan, annuity Federal Thrift Savings Plan or custodial account that qualifies under Internal Revenue Code (IRC) 401, 403(a), 403(b) or a 457 plan established by a government agency.

- This rollover contribution is all or part of a distribution from a Qualified Retirement Plan that was either sent directly to Alliant Credit Union or was received by me within the past 60 days.
- This rollover contribution is all or part of a distribution from a Roth Qualified Retirement Plan that was either sent directly to Alliant Credit Union or was received by me within the past 60 days.

Payments that represent required minimum distributions from a Qualified Plan are **NOT** eligible for rollover:

member's signature (required)

date

RETURN COMPLETED FORM TO ALLIANT CREDIT UNION. FAX: 773-462-8735