



11545 W. Touhy Avenue, P.O. Box 66945, Chicago, IL 60666 800-328-1935 www.alliantcreditunion.org

REQUEST TO TRANSFER IRA OR COVERDELL EDUCATION SAVINGS ACCOUNT (ESA) FUNDS TO AN ALLIANT CREDIT UNION IRA OR COVERDELL ESA

Section I: Credit Union member complete Section I and Mail Completed Form to the Financial Institution from which funds will be transferred.

name of financial institution where funds are currently on deposit

account number(s)

street address

name on account

city, state, zip code

country

Liquidate and Withdraw:

All funds immediately or on (date)

\$ immediately or on (date)

Check one box only:

A. Direct Transfer from Traditional IRA to Traditional IRA

C. Direct Transfer from SEP IRA to SEP IRA

B. Direct Transfer from Roth IRA to Roth IRA

D. Direct Transfer from Coverdell ESA to Coverdell ESA

E. Direct Transfer from Beneficiary IRA to Beneficiary IRA

This serves as my authorization to convert IRA funds being held in my name to cash as indicated and to initiate a direct transfer to Alliant Credit Union.

member's signature

date

Section II: Instructions to current IRA Custodian/Trustee Financial Institution.

Make check payable to: Alliant Credit Union, FBO (For Benefit Of)

Member's name

Alliant Credit Union IRA account no.

Return a copy of this form along with the transfer check to: Regular Mail: Alliant Credit Union, P.O. Box 66945, Chicago, IL 60666-0945

Overnight Mail: Alliant Credit Union, 11545 W. Touhy Ave., Chicago, IL 60666-0945

Section III: Current custodian please complete section III if individual is over age 70 1/2 and return to Alliant Credit Union with check.

Required (age 70 1/2) Traditional IRA Distribution election information:

Distribution has been made for current year YES NO

If yes, please complete below:

Term Certain No. of Years

Uniform Distribution Table used for life expectancy

Distribution - Joint Life with spouse 10 or more years younger

Spouse is the only primary beneficiary name of spouse beneficiary for joint life expectancy only. date of birth

Alliant Credit Union accepts appointment as successor custodian of the IRA funds for the above account.

Handwritten signature of Daniel Byrd

Manager, Member and Special Services