

REQUEST TO TRANSFER IRA TO AN ALLIANT CREDIT UNION IRA**Section 1: Alliant Member, complete Section 1 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

Withdraw:

- All funds immediately on _____ (Date)
and close my account.
- \$ _____ immediately or on _____ (Date)

Check on box only:

- A. Direct Transfer from Traditional IRA to Traditional IRA
- B. Direct Transfer from Roth IRA to Roth IRA
- C. Direct Transfer from SEP IRA to SEP IRA
- D. 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 number

**Return a copy of this form
along with the transfer check to:****VIA REGULAR MAIL:
Alliant Credit Union
ATTN: IRA Services
PO Box 66945
Chicago, IL 60666-0945****VIA OVERNIGHT MAIL:
Alliant Credit Union
ATTN: IRA Services
11545 W. Touhy Ave
Chicago, IL 60666-0945
800-328-1935****Section III: Current Custodian, please complete Section III if individuals is over 70½ and return to Alliant Credit Union with check.**

Required (age 70½) Traditional IRA Distribution election information:
Distribution has been made for current year YES NO

If yes, please complete below:

- Term Certain _____ (number of years)
- Uniform Distribution Table used for life expectancy
- Distribution - Joint Life with spouse 10 or more years younger

Spouse is the primary beneficiary _____
Name of spouse beneficiary for joint life expectancy only Date

Section IV: Acceptance/Custodian Authorization

Alliant Credit Union hereby accepts its appointment as Custodian of the above IRA account and upon receipt of assets, will deposit such assets in an Alliant Credit Union IRA on behalf of the Depositor authorizing this transfer.

Tim Wang

Authorized Signer on behalf of Alliant Credit Union

**Federally insured by
NCUA**