



TRANSFER REQUEST

1. IRA HOLDER'S NAME AND ADDRESS				2. CURRENT TRUSTEE OR CUSTODIAN NAME AND ADDRESS			
First Name	MI	Last Name		Custodian Name			
Address				Address			
City		State	Zip	City		State	Zip
Social Security Number		Date of Birth		Account Number		Phone	
Home Phone				Type <input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> 401k <input type="checkbox"/> Simple <input type="checkbox"/> SEP <input type="checkbox"/> _____			
3. TRANSFER INSTRUCTIONS				4. CASH HANDLING INSTRUCTIONS			
Transfer Amount		<input type="checkbox"/> All <input type="checkbox"/> Partial		<u>Check Transfer:</u> Make the check payable as follows: American Estate & Trust, LC FBO <Account Holder Name>			
Frequency		<input type="checkbox"/> Once <input type="checkbox"/> Other _____		<u>Wire Transfer:</u> Bank Name: Wells Fargo Account #: 3393886381 Routing #: 121000248 Account Name: American Estate & Trust, LC			
Cash Transfer Method		<input type="checkbox"/> Check <input type="checkbox"/> Wire					
Transfer To Account Type (Receiving account)		<input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> 401k <input type="checkbox"/> Simple <input type="checkbox"/> SEP <input type="checkbox"/> _____					

5. ASSET HANDLING INSTRUCTIONS				
Asset Description	Qty or Amount to be transferred	Liquidate Immediately	Liquidate At Maturity	Transfer In Kind
1.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. SIGNATURE	
<p>I authorize the transfer of the IRA assets in the manner described above and certify that all of the information provided by is correct and may be relied upon by the Trustee or Custodian.</p> <p>I understand that I am responsible for determining my eligibility to transfer within the limits set forth by tax laws, related regulations and plan agreements. Further, I understand that a transfer from a SIMPLE IRA to SIMPLE IRA on a more frequent basis than monthly from a Designated Financial Institution, change in my transfer request outside my election period, may result in costs or penalties. I understand that special rules apply to SIMPLE IRA to Traditional IRA transfers. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree that the Trustee or Custodian shall in no way be held responsible.</p>	
<p>_____</p> <p style="font-size: small;">(IRA Account Holder, Beneficiary or Former Spouse)</p>	<p>_____</p> <p style="font-size: small;">(Date)</p>
<div style="border: 1px dashed gray; width: 80%; margin: 0 auto; padding: 10px;"> <p style="color: gray; font-style: italic;">Place Medallion Signature Here</p> </div>	
<p><u>Please note that you should contact your current IRA custodian to determine if a medallion stamp is required.</u></p>	

7. ACCEPTING IRA CUSTODIAN	
<p>American Estate & Trust agrees to serve as the new custodian for the account of the above named individual. We agree to accept the assets being transferred.</p>	
<p>Account Identification of Accepting IRA: _____</p>	
<p>Account Type being accepted: <input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> 401k <input type="checkbox"/> Simple <input type="checkbox"/> SEP <input type="checkbox"/> _____</p>	
<p>Accepting Custodian Address:</p> <p style="text-align: center; padding: 10px 0 0 0;"> American Estate & Trust, LC 6900 Westcliff Dr.; Ste. 603 Las Vegas, NV 89145 Phone: (866) 654-6111 Fax: (702) 974-2524 Email: info@trusteeamerica.com </p>	
<p>_____</p> <p style="font-size: small;">(Authorized Signature of Accepting Custodian)</p>	<p>_____</p> <p style="font-size: small;">(Date)</p>