

Transfer Request Form

IRA to IRA Transfer

(877) 806-7362 | team@altscustodian.com



Account Owner Information

Account Holder Name

Date Of Birth *(Optional)* (MM/DD/YYYY)

Last 4 digits of SSN (####)

Account you are transferring from:

Custodian Name

Account Number

Account Name

Account Type

Alts Custodian account to receive your transfer:

Custodian Name

Alts Custodian, Inc.

Account Number

Account Name

Account Type

Assets Being Transferred

☐ Check if account is being transferred in full

Cash Amount

Send Cash Via

☐ ACH ☐ Check ☐ Wire

Transfer Assets In-Kind

We can't accept in kind real estate or precious metals transfers

Asset Name

Fair Market Value

Asset Name

Fair Market Value

Asset Name

Fair Market Value

☐ Check if additional assets are listed on an attached addendum

How should we submit this request to your Custodian?

These requirements need to be checked with your current custodian, as they might depend on the total amount being transferred

☐ My Custodian requires a medallion stamp

☐ My custodian requires the original form with wet signatures and won't accept a photocopy

If you checked any box above, please select a mailing option. Otherwise, follow the guidance from your custodian. Note that electronic requests are processed faster than mailed forms. Please select only one option.

☐ **Send request by email** Email

☐ **Send request by fax** Fax

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☐ **Send request by mail** ☐ Expedited Delivery (see Fee Schedule)

Address line 1

Address line 2

City

State

ZIP Code

Funds Delivery Instructions

Checks

Payable To:

Memo:

Mail Check To:

In-Kind Assets Documentation

Please specify ACH or Wire description as

Wire

Routing Number:

Account Number:

ACH

Routing Number:

Account Number:

ACCOUNT HOLDER SIGNATURE

- A notary public **CANNOT** provide a Medallion Signature Guarantee. Authorized Officer to Place "Medallion Signature Guarantee" Stamp Here
- A signature guarantee can be obtained from your bank
- If your current custodian does not require a Medallion Signature Guarantee, you can simply sign and date this form.

I certify that I have established or will establish a Self-Directed Account with the Custodian named below. I agree to the terms of this form. I understand that I am responsible for determining my eligibility for all transfers and I agree to indemnify and to hold the Custodian harmless against any and all situations arising from an ineligible transfer. I acknowledge that the Custodian cannot provide legal advice and I agree to consult with my own tax professional for advice.

Signature of Account Holder

Date

Authorized Officer to Place
"Medallion Signature Guarantee" Stamp Here

Letter of Acceptance of The Receiving Custodian

Alts Custodian accepts the appointment as successor custodian on behalf of the depositor and requests the transfer and/or liquidation of assets as instructed above.

Alts Custodian, Inc.

Authorized Signature:

Date: