



LETTER OF ACCEPTANCE

A Letter of Acceptance indicates IRA Financial's acceptance of asset(s) that are to be rolled over from a qualified retirement plan. Complete this form if you would like a Letter of Acceptance to be drafted by IRA Financial Trust Company. If your Custodian requires a Letter of Acceptance to move funds or assets from a Traditional, Roth, SEP or SIMPLE IRA, please complete our TRANSFER AUTHORIZATION form. If you have any questions about which type of form you should be completing, please contact us.

Return by mail: 1688 Meridian Avenue, Suite 504, Miami Beach, FL 33139
Fax: 605-415-4296 | E-mail: info@IRAFinancialGroup.com For inquiries, call: 800-472-1043 or visit IRAFINANCIALTRUST.COM

A. REQUESTOR INFORMATION

Request Date (mm/dd/yy): _____

This Form Completed by: Name: _____
Firm: _____
Phone: _____
Fax: _____
Email: _____

B. CLIENT INFORMATION

Client Name: _____ Last four digits of SSN: _____

Client's IRA Financial Trust Company Account Number: _____

Type of Account at IRA Financial: Traditional Roth SEP SIMPLE

C. CUSTODIAN INFORMATION

Current IRA Custodian/Plan Administrator Name: _____

Current IRA Custodian/Plan Administrator Address: _____

Client's Account Number at Current IRA Custodian/Plan Administrator: _____

Client is rolling over: Cash only Non-cash assets* only Both cash and non-cash assets*

* If rolling over non-cash assets in-kind, be sure to include an account statement with this form.

Type of IRA/Retirement Plan at Current Custodian:

401k 403b 457 Keogh
Pension Plan (Name: _____)
Profit Sharing Plan (Name: _____)
Defined Benefit Plan (Name: _____)
Other (Please specify: _____)

D. FORWARDING AND OTHER INFORMATION

Client wants funds sent to IRA Financial via: Check Wire (Incoming wire fee applies; see our [FEE SCHEDULE & FINANCIAL DISCLOSURE](#))

To whom and where should the LOA be forwarded?

Name: _____
Firm: _____

Send by (Select up to two (2) options):

Mail to the following address: _____
Fax to: _____
Email to: _____