IRA DIRECT TRANSFER INSTRUCTIONS (FORM 2325)

Please Print or Type

TO: _____ _____
Current IRA or QRP Fiduciary — Account Number at Current Institution

_____
Mailing Address of Current IRA or QRP Fiduciary

Please liquidate and transfer the amount indicated below from the IRA or qualified retirement plan (QRP) you are maintaining on my behalf to the IRA I have established at my credit union (named in the Identifying Information section of this form). **Make the check payable as follows: Name of Credit Union, F/B/O IRA Owner's Name**. Attach the check to a copy of this form and send it to the credit union at the address provided below. My credit union cannot accept a transfer of funds in any form other than check.

Type of Transfer Into a Traditional IRA

- ☐ From a traditional IRA*
- ☐ From a qualified retirement plan (QRP)*

Type of Transfer Into a Roth IRA

- ☐ From a traditional IRA*
- ☐ From a Roth IRA
- ☐ From a Roth 401(k)

*NOTE: The RMD for the year of transfer must be paid to the owner before the transfer is completed.

IDENTIFYING INFORMATION

_____
IRA Owner's Name (First, Initial, Last)

___ ___ ___ - ___ ___ - ___ ___ ___ ___ - ___ ___
Social Security Number — IRA Suffix

___ ___ ___ ___ ___
CUID (Credit union will complete.)

_____
Credit Union Name

_____
Credit Union Mailing Address

_____
City, State, ZIP

( ) _____
Phone Number

_____
Contact Person at Credit Union

AMOUNT AND TIMING OF TRANSFER

Liquidate the current investment and transfer the proceeds as follows. **Check one box in each column.**

Amount to Transfer:

- ☐ 1. $ _____
- ☐ 2. The entire amount in my IRA or QRP account and close my account.

Make this transfer:

- ☐ 1. On _____ .
  Date (MM/DD/YYYY)
- ☐ 2. Immediately.
- ☐ 3. At maturity of the investment.

CREDIT UNION'S SIGNATURE

The credit union named above agrees to act as successor trustee or custodian and accept the transfer described above for deposit to the IRA established on behalf of the IRA owner named above.

_____ _____
Credit Union Representative's Signature — Date (MM/DD/YYYY)

IRA OWNER'S SIGNATURE

I have established an IRA with the credit union named above. I authorize the current fiduciary of my IRA or QRP to liquidate the above described portion of my interest in the plan and send the proceeds to my credit union as directed on this form. (The IRA owner should check with the IRA or QRP fiduciary that currently has the funds to determine whether a signature guarantee is required.)

X_____ _____
IRA Owner's Signature — Date (MM/DD/YYYY)

© 2006, CUNA Mutual Group

Stock #80026
2325 (Doc Code 25)
(Rev. 1/2006)