IRA Transfer Form

(Non ACAT Eligible)

Part 1. IRA Account Owner Information

First Name

M.I.

Last Name:

Date of Birth (MM/DD/YYYY)

Address:

City:

State:

Zip Code:

Social Security Number

Phone #

Email Address:

Account Type

☐ Traditional IRA

☐ Roth IRA

Account #:

Part 2. Transferring Custodian Information

Transferring Custodian Name:

Transferring Account Number

Transferring Account Type:

☐ Traditional IRA

☐ Roth IRA

Best method to submit transfer request to your previous custodian:

Fax #:

Email Address:

Overnight Mail:

Part 3. Transfer Instructions *(You MUST provide your financial institution with appropriate Liquidation instructions prior to submitting this form)*

Entire Account Transfer (select all that apply)

☐ Cash Transfer: Transfer 100% of USD in the IRA Indicated

Partial Account Transfer (select all that apply)

☐ Cash Transfer: Amount – only $ ____________________ USD

Select Payment Type for USD (Select one) verify with custodian if funds can be sent via wire OR must be mailed check.

☐ Wire - Include statement from the delivering firm. *Send check if wire is unavailable

☐ Check – Check made out to "Webull Financial LLC FBO Accountholder Name" (include account # in memo)

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Part 4. Accountholder Authorization and Signature

I hereby certify by my signature, that my information is true and correct, and that I understand if I have required minimum distribution, it is my responsibility to remove the required amount from an IRA before the deadline.

Account Holder's Signature	**Date:**

You must verify with your custodian if electronic signature is accepted
Webull Financial LLC will submit the transfer form along with the wire/check instructions and letter of acceptance to your previous custodian.

Part 5. Letter of Acceptance (for internal use only)

We will accept the above captioned account as successor custodian:

Custodian Signature	**Date**