

Use this form to transfer funds directly from your existing IRA to your Midland Trust Company IRA.
Please include a copy of a recent statement from your current custodian.

1 PERSONAL INFORMATION

Name <i>(Your name as it appears in your plan)</i> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____		Social Security Number
Legal Address		City, State, Zip
Phone		Midland IRA Account Number

2 CURRENT CUSTODIAN/TRUSTEE

Name of Custodian/Trustee		Account Number
Transfer Department Address		City, State, Zip
Phone Number	Contact Name <i>(optional)</i>	Type of Account <input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> SEP <input type="checkbox"/> SIMPLE <input type="checkbox"/> BENEFICIARY <input type="checkbox"/> HSA <input type="checkbox"/> ESA

3 TRANSFER DETAILS *(Market fluctuations and/or administrative fees may impact the transfer amount received)*

<input type="checkbox"/> Option One: Cash Transfer <i>(Funds must be liquidated prior to request)</i>	<input type="checkbox"/> Complete Transfer <i>(Send all proceeds)</i>	How do you want your transfer form sent to your current custodian? Mail (No charge - Default) Overnight (\$30 fee)
<input type="checkbox"/> Option Two: In-Kind Transfer Asset Description <i>(For Non-cash Transfers Only)</i> _____ _____ _____	For Partial Transfers, please enter an amount below. (Remember to include \$250 minimum balance requirement plus administration fees) \$ _____	All funds will be wired to Centennial Bank ABA: 082902757 Credit Name: Midland Trust Company Credit Account: 1030311 Further Credit: Client Name, Midland Acct #

4 SIGNATURE AND ACKNOWLEDGEMENT

1. I hereby agree to the terms and conditions set forth in this Account Asset Transfer Authorization and acknowledge having established a self directed account through execution of the account application.

2. I understand the rules and conditions applicable to an Account Transfer

3. I qualify for the account transfer of assets listed in the Asset Liquidation above and authorize such transactions.

Your Signature: _____

Date: _____

ACCEPTANCE OF RECEIVING CUSTODIAN

Midland Trust Company accepts appointment as successor custodian/trustee for the assets identified on this form. Midland Trust ASSUMES NO FIDUCIARY OBLIGATIONS TO YOU AS IT HAS NO INVESTMENT CONTROL OVER THE FUNDS AND ACTS ONLY AS A CUSTODIAN OF THE ACCOUNT.

Type of Account
 Traditional Roth SEP SIMPLE HSA ESA Beneficiary IRA Beneficiary Roth IRA

By: _____ Date: _____ Account #: _____