

Steps to Completing Midland IRA Application

ALL application forms can be completed through our electronic document signature program DocuSign, Inc. However, your current custodian will require a PHYSICAL SIGNATURE on the transfer form, if applicable.

Application page 1 (personal information)

Complete all personal information, select account type, and indicate your method of funding. Please note:

- Annual contributions can be sent via check or wire directly to Midland IRA
- Transfer contributions are from IRA to IRA
- Rollover contributions are where you have personal receipt of IRA funds
- Direct rollover contributions apply when moving 401(k)s and other qualified plans to an IRA

Application page 2 (beneficiary designation)

- List all beneficiary designations and specify their share percentage
- Sign at Account Owner Signature
- Spousal consent is only required if you are married and your spouse is not listed as your 100% primary beneficiary

Application page 3 (signature and acknowledgement)

- Sign and date the bottom left-hand corner of the page

Fee schedule page

- Elect a fee schedule option
- Sign and date the bottom of the page

Note: You have the option to pay fees with a credit card outside the account. If no credit card information is provided, fees will be deducted from IRA proceeds. *A minimum \$250 cash balance must be maintained in your IRA. This is not a fee and is held in a money market account for your benefit.

Transfer form (to be used for transfers from existing IRAs with another custodian)

- Complete personal information in section 1
- Provide details about your current IRA for transfer in section 2
- Specify if this is a complete or partial cash transfer in section 3
 - Elect for your current custodian to send Midland IRA a check or bank wire
 - Elect if you want us to send your custodian this form via USPS or FedEx
- Sign and date this form in section 4

Rollover form (ONLY to be used with 401(k) rollovers or if you have personal receipt of your IRA funds)

- Complete personal information
- Provide information on custodian/trustee
- Specify direct/indirect rollover and estimate dollar amount
- Sign and date form
- Contact plan administrator and complete their direct rollover request form

