MIDLAND
SELF-DIRECTED IRAS

Internal Transfer Form

Use this form to transfer funds or assets between accounts within Midland Trust Company.
Do NOT use this form for Roth Conversions or 401k Rollovers.

1 PERSONAL INFORMATION

Name *(Your name as it appears in your plan)* ☐ Mr. ☐ Ms. ☐ Mrs. ☐ Dr. ________________________	**Social Security Number**
Legal Address	**Phone**
City, State, Zip	

2 ACCOUNT INFORMATION

Midland Account Number - Transferring From

Midland Account Number - Transferring To

Type of Account - Transferring From

☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE
☐ HSA ☐ ESA ☐ BENEFICIARY

Type of Account - Transferring To

☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE
☐ HSA ☐ ESA ☐ BENEFICIARY

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

☐ **Option One: Cash Transfer**
(Funds must be liquidated prior to request)

☐ **Option Two: In-Kind Transfer**

Asset Description *(For Non-cash Transfers Only)*

____

____

____

☐ **Complete Transfer**
(Send all proceeds)

For Partial Transfers, please enter an amount below.
(Remember to include $250 minimum balance requirement plus administration fees)

$ ______________

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.

By: ________________________________ **Date:** ______________