GOLDSTAR TRUST COMPANY

P.O. BOX 719
1401 4TH AVE
CANYON, TX 79015
(800) 486-6888

# ROTH IRA TRANSFER REQUEST

**IMPORTANT! CONTACT YOUR CURRENT PLAN ADMINISTRATOR TO SEE IF THEY REQUIRE THEIR OWN PAPERWORK**

## GOLDSTAR IRA ACCOUNT OWNER

Name: _____ SS #: _____ Date of Birth: ____/____/_____

Address: _____ Daytime Phone #: _____

_____ Email: _____

## CURRENT ROTH IRA INFORMATION

***Please provide a copy of a recent statement from your Roth IRA trustee***

Trustee's Name: _____ Account #: _____

Trustee's Address: _____ Phone #: _____

City, State, & Zip _____

## ASSET LIQUIDATION INSTRUCTIONS

☐ Close my current account after transfer ☐ Partial transfer

| Asset Description | Quantity in IRA | Quantity To Be Transferred | Liquidate Immediately | Liquidate at Maturity | Transfer in Kind |
|---|---|---|---|---|---|
| | | | ☐ | ☐ | ☐ |
| | | | ☐ | ☐ | ☐ |
| | | | ☐ | ☐ | ☐ |

Please make check payable as follows: GoldStar Trust Company, FBO: _____ IRA.
*(IRA Holder's Name)*

## SPECIAL INSTRUCTIONS *(Wire transfer request, etc.)*

## CLIENT AUTHORIZATION

I authorize the transfer of the IRA assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by GoldStar Trust Company.

I understand that I am responsible for determining my eligibility to transfer within the limits set forth by tax laws, related regulations and plan agreements. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree that the Trustee or Custodian shall in no way be held responsible.

_____ _____
*Client's Signature* *Date*

## GOLDSTAR TRUST COMPANY LETTER OF ACCEPTANCE

GoldStar Trust Company agrees to serve as the new Custodian for the account of the above-named individual, and as Custodian, we agree to accept the assets being transferred.

**GoldStar Account Identification #** _____

GoldStar Trust Company
Tax ID# 74-2557688

_____ _____
*Authorized Signature for GoldStar* *Date*

## SIGNATURE GUARANTEE

*Check with your current custodian to determine if a Medallion Stamp Guarantee is required. This is NOT a requirement of GoldStar Trust Company.*