



## AUTHORIZATION TO TRANSFER A CONTRIBUTION

I authorize the following transfer into my IRA/ROTH/SEP/ESA according to the information provided below.

### TAXABLE ACCOUNT INFORMATION (Account Cash is Transferring From)

Account Title
Account Number

### IRA ACCOUNT INFORMATION (Account Cash is Transferring Into)

Account Title
Account Number

### CASH TRANSFER INFORMATION

Amount of Transfer: \$ _____
Tax Year of Contribution: <input type="checkbox"/> Previous Year <input type="checkbox"/> Current Year
Type of IRA: <input type="checkbox"/> Traditional IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SEP IRA <input type="checkbox"/> ESA
*For SEP Contributions Only Type of Contribution: <input type="checkbox"/> Employee <input type="checkbox"/> Employer

X \_\_\_\_\_  
Account Holder's Signature      Date

X \_\_\_\_\_  
Account Holder's Signature      Date

Signature Verification via  Application  Signature Page  ID

\_\_\_\_\_  
Associate Initials



SF2037/11-15