

Transfer Due to Divorce

Complete and sign this form and return to Quest Trust Company (QTC) to request a transfer of interest from one IRA to an ex-spouse's IRA as a result of a divorce decree or legal separation.
Note: QTC is not able to process this form nor accept any instructions that require any form of interpretation (e.g., calculations of earnings, interest, penalties, "as of" specific date, or division/split date.)

A ACCOUNT HOLDER INFORMATION

Name as it appears on Account:	QTC Account Number:
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B RECEIVING PARTY INFORMATION

Name of Recipient:

C TRANSFER INSTRUCTIONS

Transfer into (select one)

- Transfer into existing QTC IRA Account Number: _____
- Transfer into a new QTC IRA Account (Please complete and attach QTC Account Application)
- Transfer to another Financial Institution (Please contact receiving financial institution to initiate transfer out)
- Distribute to recipient personally (Attach QTC Distribution form)

Transfer Instructions:

- Transfer the entire account balance
- Transfer the following dollar amount \$ _____
- Transfer specific assets – Please complete Asset Description below

A copy of the divorce decree or legal separation order signed by a judge must be included. The decree or order must include language referencing the account(s) and amounts being transferred.

Indicate the section or page of legal document that references the account(s) being transferred: _____

D ASSET DESCRIPTION

Investment Name	Percentage to transfer	Market Value

E ACCOUNT OWNER SIGNATURE (Relinquishing party)

I acknowledge that no legal advice has been given to me by QTC. I agree that QTC is not responsible for any consequences that may arise from processing this form. I expressly assume responsibility for any consequences that may arise from any transfers initiated by this form. I certify that all information provided by me is true and accurate.

I confirm that I am directing QTC, as Custodian of my account, to complete this transaction as specified above. I certify that I am the proper party to direct this transaction and that all information provided by me is true and accurate.

Client Signature: _____ Date: _____

F RECEIVING PARTY SIGNATURE

I acknowledge that no legal advice has been given to me by QTC. I agree that QTC is not responsible for any consequences that may arise from processing this form. I expressly assume responsibility for any consequences that may arise from any transfers initiated by this form. I certify that all information provided by me is true and accurate. I certify that I am the proper party to receive payment(s) from this account, and that all information provided by me is true and accurate. I further certify that QTC has given no tax advice or legal advice to me, and that all decisions regarding this transfer request are my own. I hereby authorize this transfer and instruct QTC to transfer the assets as indicated above.

Client Signature: _____ Date: _____