

Use this form for internal transfers within Quest Trust Company (QTC) accounts.
This form cannot be used for Roth conversions or recharacterizations. Separate forms must be submitted for each.

A QUEST TRUST COMPANY ACCOUNT TO TRANSFER FROM:

Name as it appears on Account:	Account Number:
--------------------------------	-----------------

I am transferring **FROM** the following type of plan: *(check one box)*

- Traditional IRA
 Roth IRA
 SEP IRA
 SIMPLE IRA
 Beneficiary IRA
 HSA
 ESA

B QUEST TRUST COMPANY ACCOUNT TO TRANSFER TO:

Name as it appears on Account:	Account Number:
--------------------------------	-----------------

I am transferring **TO** the following type of plan: *(check one box)*

- Traditional IRA
 Roth IRA
 SEP IRA
 SIMPLE IRA
 Beneficiary IRA
 HSA
 ESA

C TYPE OF TRANSFER

Please select either (1) a complete transfer or (2) a partial transfer: **(check one box)**

<input type="radio"/> COMPLETE TRANSFER: A complete transfer will move all cash and assets to your account of choice and close your current account. Please complete Section D below if you are transferring assets in-kind.	<input type="radio"/> PARTIAL TRANSFER: <input type="radio"/> CASH - Please send: <input type="radio"/> All available cash or <input type="radio"/> Specific amount \$ _____ <input type="radio"/> IN-KIND: Please see Section below if you are converting assets in-kind.
---	---

D ASSET DESCRIPTION

Please complete this section if you are transferring assets in-kind. Transferring assets "in-kind" refers to the process of re-registering an asset with the proper vesting for your QTC account. If you are transferring more than 8 assets, please attach a separate list of assets being transferred.

E AUTHORIZATION

I hereby authorize this transfer and instruct Quest Trust Company, as my custodian, to transfer the assets in my account as indicated above.

Client Signature: _____ Date: _____