Internal Transfer Form

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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)

☐ **COMPLETE TRANSFER:**	☐ **PARTIAL TRANSFER:**
A complete transfer will move all cash and assets to your account of choice and close your current account.	☐ CASH - Please send: ☐ all available cash or ☐ specific amount $ ___________________________
Please complete Section D below if you are transferring assets in-kind.	☐ IN-KIND: Please see Section D below if you are transferring 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:_____________________________________