



**QUEST TRUST**  
C O M P A N Y

# Transfer Due to Divorce

**Quest Trust Company**  
17171 Park Row, Suite 100  
Houston, TX 77084  
P: 800.320.5950  
F: 281.646.9701  
Documents@QuestTrust.com

Complete and sign this form and return to Quest Trust Company 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: Quest Trust Company 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.)

## ACCOUNT OWNER INFORMATION (Relinquishing party)

Name as it appears on Account:

QTC Account Number:

## RECEIVING PARTY INFORMATION

Name of Recipient:

## 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: \_\_\_\_\_

## 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 the applicable parties fail to provide the appropriate in-kind asset re-registration document(s) within 60 days of the completion of this form, Quest Trust Company will automatically complete the transfer(s) in accordance to the divorce decree provided (fees may apply in this case).

Investment Name	Percentage to transfer	Market Value

## ACCOUNT OWNER SIGNATURE (Relinquishing party)

I acknowledge that no legal advice has been given to me by Quest Trust Company. I agree that Quest Trust Company 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 Quest Trust Company (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: \_\_\_\_\_

## RECEIVING PARTY SIGNATURE

I acknowledge that no legal advice has been given to me by Quest Trust Company. I agree that Quest Trust Company 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 Quest Trust Company 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: \_\_\_\_\_