



QUEST TRUST
C O M P A N Y

Recharacterization Re-designation of Contribution

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Complete this form to make an irrevocable election to recharacterize all or a portion of a contribution.

Note: A recharacterization is a tax-reportable event. See IRS form 8606 and its instructions, or contact a tax advisor for tax reporting questions.

ACCOUNT HOLDER INFORMATION

Name:	Account Number:
Social Security Number (SSN):	Date of Birth:
Legal Address:	City, State, Zip Code:

RECHARACTERIZATION OF CONTRIBUTION

Amount of original contribution: _____ Date of original contribution (mm/dd/yyyy): _____

Select one:

Recharacterizing (redesignating) a Traditional/Sep contribution as a Roth contribution.

Recharacterizing (redesignating) a Roth Contribution as a Traditional IRA contribution.

Transfer the recharacterized amount of \$ _____ or percentage _____ % to my account number: _____

Traditional IRA

Roth IRA

SEP IRA

Simple IRA

ACCOUNT HOLDER SIGNATURE

I certify that all of the information I have provided is correct. I understand that transactions from this account are reported to the IRS. I further certify that Quest Trust Company has given no tax advice to me and that all decisions regarding this recharacterization are my own. I expressly assume the full responsibility of determining that this transaction qualifies as a recharacterization under Internal Revenue Service (IRS) regulations. I agree that Quest Trust Company shall in no way be responsible for those consequences.

Signature of Account Holder: _____ Date: _____