

Transfer Form

Quest Trust Company 17171 Park Row, Suite 100 Houston, TX 77084 P: 855.386.4727 | F: 281.646.9701 Documents@QuestTrust.com

INSTRUCTIONS

- This form should only be used if you are transferring funds from an existing IRA.
- If you have not established an account with Quest Trust Company, please contact our office.
- If you are transferring from a brokerage IRA, you will need to liquidate the appropriate assets prior to submitting this transfer request.
- A separate Transfer Form will need to be completed for each account being transferred to Quest Trust Company
- Contact your current custodian to confirm whether a Medallion Signature Guarantee is needed. If so, check with your local bank or broker/dealer to see if they offer this service. Note: Quest Trust Company cannot provide this stamp.
- Contact your current custodian to confirm if they will accept faxed copies of your transfer request.

A ACCOUNT HOLDER PERSONAL INFORMATION					
Account Holder's Name:	Quest Trust Company Account Number:				
Social Security Number:	Date of Birth:				
B CURRENT CUSTODIAN PLAN INFORMATION					
Name of Current Custodian:	Account Number (Please limit one account per form):				
Address:	City, State, Zip Code:				
Telephone Number:	ax:				
I have attached a co	py of recent statement				
C TYPE OF ACCOUNT TO BE TRANSFERRED/ELIGIBILITY					
1. I am transferring FROM the following type of plan: (check one box)					
Traditional IRA Roth IRA SEP IRA SIMPLE IRA	HSA ESA Beneficiary Trad IRA Beneficiary Roth IRA				
2. I am transferring TO the following type of plan: (check one box)					
Traditional IRA Roth IRA SEP IRA SIMPLE IRA	HSA ESA Beneficiary Trad IRA Beneficiary Roth IRA				
3. I am an eligible person to perform this transaction: (check one box)					
Account Owner Responsible Individual (ESA) Death Beneficiary					
D TYPE OF TRANSFER					
If you wish to transfer any cash as a part of your transfer to Quest Trust Company, ensure that the liquidation process is completed prior to submitting this form. Otherwise, the transfer of your funds may be delayed.					
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 Quest Trust Company, and close your current account. Please attach a recent statement of the account you wish to move.	CASH - Please send:				
	Specific amount \$				
Please complete Section E below if you are transferring assets in-kind.	IN-KIND: Please see Section E below if you are transferring assets in-kind.				
E 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 four assets, please attach a separate list of assets being transferred.					



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F PROCESSING INSTRUCTIONS

<form> Oppose Register Mail (Y) Oppose Tracksore Mail (101) Operange Mail (102) Operan</form>	How would you like this form sent to your current custodian? Contact your current custodian to confirm the address where paperwork should be sent and/or if faxed copies are acceptable. If this section is left blank, the default selection will be fax (if custodian accepts) or priority mail.					
<form> </form>	USPS Regular Mail (\$0)	USPS Trackable Mail (\$10)	Overnight Mail (\$35 fee*)		
Believe working you like your current tabled in the and be funds to Quest Tract Company? If the Uarks, the defaults addiction will be regular multifues.	If you have selected overnight mai	, how would you like to pay for the	e overnight fee? <i>Note, i</i> j	f payment method is	s not selected, any incurred fees will be deducted from the account.	
Money and use your current custodian to send the funds to Quest Trust Company? If let bank, the default selection will be regular malifiched. Finds available within 24 hours of receipt. Not14 of custodian is anable to du diglarit will be read Mile Contrained Not14 of custodian is anable to du diglarit will be read Mile Contrained Provide selection Son Sands Son Anton, XB Quast Trust Company To Trust Contrained Account Notife Name Quast Trust Company To Trust Contrained Account Notife Name Quast Trust Company To Trust Name Account Notife Name Quast Trust Company To Trust Name Receive Trust Company 100 Account Notife Name Quast Trust Company To Trust Name Quast Trust Company 100 Account Notife Name Quast Trust Company To Trust Name Quast Trust Company 100 Account Notife Name Quast Trust Company To Trust Name Quast Trust Company 100 Account Notife Name Quast Trust Company To Trust Name Quast Trust Company 100 Account Notife Name Note the deal later is the regular malify the result of the discound any send of the discound any and trust Name Quast Trust Company 100 Account Note Note the deal later is the regular malify the result of the discound any send of the discound any and trust Name Quast Trust Company 100 Account Note Note deallate on trust of the deal later in app 20.02 </td <td></td> <td>/ly Account</td> <td>Credit Card on fi</td> <td>ile</td> <td colspan="2">Check Enclosed</td>		/ly Account	Credit Card on fi	ile	Check Enclosed	
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Quest Trust Company 1717 Park Kow Suite 100 Account Holder Name Account Number: Quest Trust Company FBO [Account Holder's Name] [Account Number] P171 Park Kow Suite 100 Hease mail to: Quest Trust Company FBO [Account Holder's Name] Prease mail to: Quest Trust Company FBO [Account Holder's Name] REQUIRED MUMUM DISTRIBUTION (RMD) REINDER Prease mail to: Quest Trust Company 1717 Park Kow, Suite 100, Houston, TX 77084 Understand that If his transfer is occurring during or after the calendary year during which I reach my Required Beginning Date ("RBD"), the required minimum amound Betributed. Further understand that the current calcodian is not responsible for making this distribution prior to the transfer. I accept ful responsible for making this distribution applicable to the IRA being transferred by 11, 1939, my RD is the date I date age 72. If this transfer was received as of the prior December 31st for determining any required minimum distribution applicable to the IRA being transferred by 11, 1939, my RD is the date I date age 72. If this transfer was received as of the prior December 31st for determining any required minimum distribution from the QTC for the year that the transfer was received as of the prior December 31st. I must 'therem' that the transfer and instruct my current custodian to transfer the assets in my account as indicated above. Client Signature Date: If weld how the current custodian to transfer the assets in my account as indicated above. Client Signature Date: If expured by your current custodian; Metallion Signature Gust	Frost Bank San Antonio, TX					
Inderstand that if this transfer is occurring during or after the calendar year during which I reach my Required Beginning Date (*RBD*), the required minimum amount determined under the IRA being transferred is still required to be distributed. I further understand that the current custodian is not responsible for making this distribution prior to the transfer. I understand that if I was born before July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. 11/2, and If I was born or after July 1, 1949, my RBD is the date I attain age 70. If I was born or after July 1, 1949, my RBD is the date I attain age 70. If I was born or after July 1, 1949, my RBD is the date I attain age 70. If I was born before July 1 and I was born before July 1. 1949, my RBD is the date I attain age 70. If I was born before July 1 and I was born before July 1. 1949, my RBD is the date I attain age 70. If I was born before July 1 and II was born before July 1 was born before July 1 was	Quest Trust Company 17171 Park Row, Suite 100 Houston, TX 77084	Account Holder Name	Quest Trust Please mai		st Trust Company FBO [Account Holder's Name] [Account Number] ase mail to:	
under the IRA being transferred is sull required to be disributed. If urther understand that the current custodian is not responsible for making this distribution prior to the transfer. I understand that if I was born before July 1, 1949, my RBD is the date I attain age 70 1/2, and if I was born or or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and if was born on or after July 1, 1949, my RBD is the date I attain age 70 1/2, and If was born on exerced as of the prior December 31st. I must 'deem' that the transfer date set is more ease subtracting that the transfer date set is in my account as indicated above. Client Signature:	REQUIRED MINIMUM	DISTRIBUTION (RMI	D) REMINDER	(PLEASE NOTE IF	TRANSFERRING FROM A TRADITIONAL, SEP, OR SIMPLE IRA)	
I hereby authorize this transfer and instruct my current custodian to transfer the assets in my account as indicated above. Client Signature: Date: Date: Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature Guarantee (If required by your current custodian) Medallion Signature	under the IRA being transferred is still required to be distributed. I further understand that the current custodian is not responsible for making this distribution prior to the transfer. I accept full responsibility for satisfying the required minimum distribution applicable to the IRA being transferred by withdrawing sufficient amounts from my QTC or another IRA prior to the deadline for receiving minimum distributions for the calendar year of the transfer. I understand that if I was born before July 1, 1949, my RBD is the date I attain age 70 1/2, and if I was born on or after July 1, 1949, my RBD is the date I attain age 72. If this transfer leaves my current custodian in one year, but does not reach QTC until the following year, I understand that this will be an "outstanding transfer" as of December 31st. I must "deem" that the transfer was received as of the prior December 31st for determining any required minimum distribution from the QTC for the year that the transfer was					
Client Signature: Date:	H ACCOUNT HOLDER SIGNATURE (ELECTRONIC SIGNATURE NOT ACCEPTED)					
Medallion Signature Guarantee (if required by your current custodian) I LETTER OF ACCEPTANCE BY QUEST TRUST COMPANY (OFFICE USE ONLY) Quest Trust Company agrees to serve as custodian for the account of the above named individual, and as custodian, QTC agrees to accept the assets of the account being transferred. Quest Trust Company Acceptance Signature: Date:	I hereby authorize this transfer and instruct my current custodian to transfer the assets in my account as indicated above.					
Image: company agrees to serve as custodian for the account of the above named individual, and as custodian, QTC agrees to accept the assets of the account being transferred. Quest Trust Company Acceptance Signature:	Client Signature:					
Quest Trust Company agrees to serve as custodian for the account of the above named individual, and as custodian, QTC agrees to accept the assets of the account being transferred. Quest Trust Company Acceptance Signature:	(if required by your current custodian)					
transferred. Quest Trust Company Acceptance Signature:						
			_		Date:	