



IRA RESOURCES, INC.

Roth Conversion

1. ACCOUNT OWNER INFORMATION

First Name	Initial	Last Name	IRAR Account Number	Social Security Number
Email Address				Daytime Phone Number
Type of Account Being Converted <i>(check one)</i> <input type="checkbox"/> Traditional IRA <input type="checkbox"/> SIMPLE IRA <input type="checkbox"/> SEP IRA				

2. CONVERSION INFORMATION

Choose One Of The Following:	
<input type="checkbox"/> New Roth IRA <i>This is a conversion to a NEW Roth IRA. An account application must be attached.</i>	<input type="checkbox"/> Existing Roth IRA <i>This is a conversion to an EXISTING Roth IRA</i> Existing Roth Account Number:
Choose One Of The Following:	
<input type="checkbox"/> Full Conversion <i>(Convert all assets held in the above account)</i> <input type="checkbox"/> Leave the converted account open <input type="checkbox"/> Close the converted account	<input type="checkbox"/> Partial Conversion <i>(Convert the assets indicated below)</i>
Asset(s) Description <i>(real estate, note, stock, LLC, etc.)*</i>	Indicate Dollar Amount <i>(do not use percentages)</i>
* A Fair Market Valuation (FMV) Form must be filled out (including supporting documentation) for each asset being converted	

3. TAX WITHHOLDING

The IRS requires withholding of 10% of Traditional IRA funds being converted to a Roth IRA unless you instruct us otherwise. If you use IRA money to pay the taxes owed when you convert from the Traditional IRA to the Roth IRA, you may owe a federal early withdrawal penalty on the funds if you are under 59 ½ (because the IRA will treat this money as a withdrawal from your IRA), and you will also owe income taxes.

Please make your selection below. Please note that if neither election is made, IRAR Trust must automatically withhold 10% of funds. Distributions (including this conversion) from your IRA are subject to federal (and possible state) income tax. If you elect to not have taxes withheld, you are nevertheless liable for payment of income tax and any applicable tax penalty and interest on the taxable portion of the distribution.

Federal Withholding	State Withholding
<input type="checkbox"/> I elect to NOT have federal income tax withheld <input type="checkbox"/> I elect to have _____% federal income tax withheld <i>(must be greater than 10%)</i> In addition to the percentage, I elect to have \$_____ federal income tax withheld	<input type="checkbox"/> I elect to NOT have state income tax withheld <input type="checkbox"/> I elect to have ____% state income tax withheld* *State withholding will only be processed for the following state: California



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4. PAYMENT OF IRAR FEES

<p>How Will You Pay for Transaction Fees? Transaction fees are charged upon form submission. If credit card is declined, fees will be debited from IRA. Transaction will NOT be processed without payment.</p>			
<input type="checkbox"/> Debit IRAR Account		<input type="checkbox"/> Credit Card <i>(complete credit card information below)</i>	
<p>Credit Card Type</p> <input type="checkbox"/> Visa <input type="checkbox"/> Master Card <input type="checkbox"/> American Express <input type="checkbox"/> Discover <input type="checkbox"/> Save this card to my account for future fees			
Name As it Appears on the Card		Card Number	
Billing Address		Billing City	
Expiration Date		Security Code	
Billing State		Billing Zip	
<p>By signing below, I authorize my credit card to be charged for the option(s) chosen above. I understand that inaccurate or incomplete credit card information or charges declined by the credit card issuer will delay the processing of the account transaction. Future changes to the option made above must be submitted in writing.</p>			
Signature			Date
➔			

5. ACCOUNT OWNER CERTIFICATION AND ACKNOWLEDGEMENT

Your signature is required. Please ensure that you read and acknowledge the following disclosure before you sign and date this form.

- I certify that the information provided is true and correct to the best of my knowledge, and I certify that no tax advice has been given to me by IRAR Trust Company;
- I acknowledge a conversion from a traditional IRA to a Roth IRA is treated as a taxable distribution. It is recommended that I consult with my tax advisor before completing this transaction;
- I acknowledge that this transaction is subject to federal income tax withholding unless I have specifically requested above, that federal income taxes not be withheld, and I am eligible to opt out of withholding;
- I acknowledge that state tax withholding rules may also apply;
- I acknowledge that the taxable converted amount will be subject to federal income taxes in the year in which the conversion occurs;
- I expressly assume the responsibility for any adverse consequences which may arise from this conversion request and I agree that I will indemnify IRAR Trust Company from any liability if I fail to meet any IRS requirement.

If fees are being deducted from your account, the full amount of the fees must be available before your transaction can be processed.

I declare that I have examined this document, including accompanying information, and to the best of my knowledge and belief, it is true, correct, and complete.

PRINT NAME	ACCOUNT OWNER SIGNATURE	DATE
	➔	

Submission Options

FAX	EMAIL	MAIL
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