



Use this form to transfer funds directly from your existing IRA to your Midland Trust Company IRA.  
**Please include a copy of a recent statement from your current custodian.**

## 1 PERSONAL INFORMATION

Name (Your name as it appears in your plan)	Social Security Number
Legal Address	
Phone	Midland IRA Account Number

## 2 CURRENT IRA CUSTODIAN

Name of Custodian/Trustee	Account Number
Contact Name (optional)	Phone Number
Type of Account <input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> SEP <input type="checkbox"/> SIMPLE <input type="checkbox"/> Inherited - Traditional <input type="checkbox"/> Inherited - Roth <input type="checkbox"/> HSA <input type="checkbox"/> ESA	

## 3 TRANSFER DETAILS (Market fluctuations and/or administrative fees may impact the transfer amount received)

<input type="checkbox"/> <b>Option One: Cash Transfer</b> (Funds must be liquidated for request to be processed) <input type="checkbox"/> Full - Transfer All Available Cash <input type="checkbox"/> Partial - Send Only \$ _____ (Please include \$250 minimum balance requirement plus suggested 3 years fees)	<input type="checkbox"/> <b>Option Two: In-Kind Transfer</b> (For Non-Cash Transfers Only) <input type="checkbox"/> Full - Transfer All Cash and Assets In-Kind <input type="checkbox"/> Partial - Send Only the Assets Listed Below (Please include \$250 minimum balance requirement plus suggested 3 years fees)		
<b>All Funds Wired To</b> Capital One NA ABA: 065000090 Credit Name: Midland Trust Company Credit Account: 4670298760 Further Credit: Client Name, Midland Acct #	<b>Asset Description</b> (in-kind transfers only)	<b>Asset Contact</b> (name)	<b>Contact Email</b>

If your custodian does not accept electronic copies, how would you like this sent? ☐ Mail (No Charge - Default) ☐ Overnight (\$30 Fee)

## 4 SIGNATURE AND ACKNOWLEDGEMENT

1. I hereby agree to the terms and conditions set forth in this Account Asset Transfer Authorization and acknowledge having established a self directed account through execution of the account application.

2. I understand the rules and conditions applicable to an Account Transfer.

3. I qualify for the account transfer of assets listed in the Asset Liquidation above and authorize such transactions.

Your Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## ACCEPTANCE OF RECEIVING CUSTODIAN

Midland Trust Company accepts appointment as successor custodian/trustee for the assets identified on this form. Midland Trust ASSUMES NO FIDUCIARY OBLIGATIONS TO YOU AS IT HAS NO INVESTMENT CONTROL OVER THE FUNDS AND ACTS ONLY AS A CUSTODIAN OF THE ACCOUNT.

### Type of Account

☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE ☐ HSA ☐ ESA ☐ Inherited - Traditional ☐ Inherited - Roth

By: \_\_\_\_\_ Date: \_\_\_\_\_ Account #: \_\_\_\_\_