

Request for Transfer to an IRA

for Traditional and SIMPLE IRAs

** FAILED TRANSFER
IRA FROM US BANK
to Sterling Bank*

1 IRA OWNER INFORMATION

NAME AND ADDRESS		
Name	Street address	City, State, and Zip Code
ELANA LAHAM	7104 Lindsey Ave SE Apt 207 Auburn WA 98092	
DAYTIME PHONE NUMBER		EMAIL (OPTIONAL)
253-657-4136		n/a

2 TYPE OF TRANSFER

Select One:

Traditional IRA to a Traditional IRA SIMPLE IRA to a SIMPLE IRA SIMPLE IRA to a Traditional IRA

◆ If applicable, the required minimum distribution has or has not been satisfied for this distribution year prior to this transfer. If not, the transferee custodian/trustee may require additional documentation.

◆ SIMPLE IRA funds cannot be transferred to a traditional IRA for two years following the date of the initial SIMPLE contribution.

3 TRANSFEROR CUSTODIAN/TRUSTEE REQUEST

My IRA custodian/trustee (transferor), US BANK, should transfer the assets identified in the Transfer Instructions section.

TRANSFEROR ADDRESS	TRANSFEROR PHONE NUMBER
US BANK AUBURN OFFICE 401 15TH ST NE AUBURN WA 98002	1-800-872-2657
	TRANSFEROR IRA ACCOUNT NUMBER
	6-535-0378-5962

4 TRANSFER INSTRUCTIONS (See Additional Information included with this form.)

Complete my transfer as directed. Note: Penalties and market fluctuation may affect the distribution amount.

<p>A. Payment Amount (select one):</p> <p><input checked="" type="checkbox"/> My entire IRA balance.</p> <p><input type="checkbox"/> A portion of my IRA balance. \$ _____</p>		<p>B. Payment Schedule and Investments (select one):</p> <p><input checked="" type="checkbox"/> Immediately liquidate all investments and send cash proceeds.</p> <p><input type="checkbox"/> Send all investments in kind.</p> <p><input type="checkbox"/> Liquidate the investments as identified below:</p>																									
<table border="1"> <thead> <tr> <th>Account Number or Investment</th> <th>Dollar Amount or Number of Shares</th> <th>Transaction Date</th> <th>Send:</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>\$ _____ or _____ shares</td> <td>_____</td> <td><input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind</td> </tr> <tr> <td>_____</td> <td>\$ _____ or _____ shares</td> <td>_____</td> <td><input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind</td> </tr> <tr> <td>_____</td> <td>\$ _____ or _____ shares</td> <td>_____</td> <td><input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind</td> </tr> <tr> <td>_____</td> <td>\$ _____ or _____ shares</td> <td>_____</td> <td><input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind</td> </tr> <tr> <td>_____</td> <td>\$ _____ or _____ shares</td> <td>_____</td> <td><input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind</td> </tr> </tbody> </table>	Account Number or Investment	Dollar Amount or Number of Shares	Transaction Date	Send:	_____	\$ _____ or _____ shares	_____	<input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind	_____	\$ _____ or _____ shares	_____	<input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind	_____	\$ _____ or _____ shares	_____	<input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind	_____	\$ _____ or _____ shares	_____	<input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind	_____	\$ _____ or _____ shares	_____	<input type="checkbox"/> Cash Proceeds <input type="checkbox"/> In Kind	<p><input checked="" type="checkbox"/> Other <u>CASHIERS CHECK</u></p>		
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<p>C. Delivery Instructions</p> <p>(1) Transferee IRA Account Number <u>49993939008</u></p> <p>(2) Make check payable to or certificate registration in the name of <u>Sterling Savings Bank</u> as <input checked="" type="checkbox"/> custodian / <input type="checkbox"/> trustee for the <input checked="" type="checkbox"/> traditional / <input type="checkbox"/> SIMPLE IRA of <u>Elana Laham</u></p>																											

SIGNATURES

I certify that the information contained on this form is true and correct. I direct the transferor custodian/trustee to transfer my IRA assets as set forth in this form. I understand I should seek the guidance of an attorney or legal professional with regard to this decision. I understand that if I establish a separate conduit account, it is my responsibility to keep my conduit account separate from my other accounts. I understand that my custodian/trustee cannot provide legal advice. I indemnify and agree to hold the custodian/trustee harmless against any liabilities. I assume full responsibility for the consequences of this transfer decision. The custodian/trustee agrees to accept these funds as a transfer.

Signature of IRA Owner

Date

Signature of Transferee Custodian/Trustee

Date