DIGITAL **INVESTOR**
NAVY FEDERAL INVESTMENT SERVICES

DriveWealth

IRA

TRADITIONAL / ROTH IRA TRANSFER REQUEST

Use this form to transfer outside IRA assets to your DriveWealth IRA (traditional IRA-to-traditional IRA or Roth IRA-to-Roth IRA).

PART 1. RECIPIENT

Individual requesting the transfer

Name *(First/MI/Last)* ____________________

Social Security Number ____________________

Date of Birth ____________________ Phone ____________________

Email Address ____________________

Account Number ____________________

ACCEPTING ACCOUNT TYPE *(Select one)* Traditional ☐ Roth IRA ☐

PART 2. ACCEPTING IRA TRUSTEE OR CUSTODIAN

To be completed by the IRA trustee or custodian receiving the assets

Name DriveWealth, LLC

Address Line 1 15 Exchange Place

Address Line 2 10th Floor

City/State/ZIP Jersey City, NJ 07302

PART 3. CURRENT IRA TRUSTEE OR CUSTODIAN

Address Line 1 ____________________

Address Line 2 ____________________

City/State/ZIP ____________________

Phone ____________________

CURRENT IRA Type *(Select One)*

☐ Traditional IRA ☐ ROTH IRA

PART 4. TRANSFER INSTRUCTIONS

Transfer Amount: ____________________ **Full transfer? Yes** ☐ **No** ☐

VIA WIRE:

Beneficiary Name: DriveWealth LLC as Custodian for____________________ **IRA Account #**____________________

Name of Account Owner

Bank Name: Silicon Valley Bank ABA Number: 121140399 Bank Account Number: 3303431344

VIA CHECK:

Make payable to DriveWealth, LLC as Custodian of ____________________**IRA Account #**____________________

Name of Account Owner

Mail check to:

DriveWealth, LLC
Attn: Operations / IRAs
15 Exchange Place
10th Floor
Jersey City, NJ 07302

PART 5. SIGNATURES

I authorize the transfer of these IRA assets and certify that all information provided by me is true and accurate. I understand that I am responsible for determining that this IRA transfer qualifies under the rules that apply to such transfers and agree to comply with those rules. I assume responsibility for any consequences that may result from this transfer and I agree that the trustee or custodian is not responsible for any consequences that may arise from executing this transfer request.

The trustee or custodian signing below agrees to accept the assets being transferred.

X ____________________ ____________________

Signature of Recipient — Date *(mm/dd/yyyy)*

X ____________________ ____________________

Notary Public/Signature Guarantee *(If required by the trustee or custodian)* — Date *(mm/dd/yyyy)*

X ____________________ ____________________

Authorized Signature of Accepting Trustee or Custodian — Date *(mm/dd/yyyy)*

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