

## ACCOUNT TRANSFER REQUEST

(LIBERTY TRUST COMPANY ACCOUNT NUMBER)

Use this form to transfer all or part of the assets from an IRA with another custodian to your IRA with Liberty Trust Company, Ltd.

FOR PROCESSING, RETURN TO: IPS ♦ 8226 Douglas Avenue ♦ Suite 520 ♦ Dallas, Texas 75225-5927 ♦ 800-473-1977 ♦ 855-739-1987 FAX

Legal Name:				Da	te of Birth:	
Address:			So	Soc. Sec. Number:		
City, State, Zip: _						
Type of Account a	at Liberty Trust	Company, Ltd	(check one):			N of demands
☐ Traditional IRA	☐ Roth IRA	☐ SEP IRA	☐ SIMPLE IRA	☐ This is a		Name of deceased:
CURRENT CUSTO	DIAN INFORMATI	ION				
Name of Custodia	n:				Contact:	
Address:					Phone:	
City, State, Zip:						
Type of Account b	peing transferre	<b>d</b> (check one):				
	_	•				Name of deceased:
☐ Traditional IRA	☐ Roth IRA	☐ SEP IRA	☐ SIMPLE IRA	☐ This is a	lso an Inherited IRA	
					lso an Inherited IRA	
TRANSFER INSTR	UCTIONS—Pleas Liberty Trust Con Regular Mail	se provide a cop npany to send t \( \square\) Overni	py of the most rece the Account Transfo ight Mail (\$35)	nt Account Sta er Request to	atement from your ex	
I hereby authorize I method:  WARNING REGAL Although you may please be aware the avoid delays in pro	Liberty Trust Con Regular Mail  ARDING LIQUI request your current MANY custor becessing, we street transfer. This me	npany to send t  Overni  DATION ORE rent Custodian DIANS WILL NOT ongly recommeneans that you	the Account Transferight Mail (\$35)  DERS  to liquidate some of HONOR THE LIQUIDA and that you verify may have to liquidate	nt Account State  Practice  Fax:  or all of your hation request that your accounts	my existing Custodia moldings into cash are and will return your	xisting Custodian  an utilizing the following (verify with current custod and transfer the cash to transfer request to up the Custodian has suffice.)
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 $\underline{\text{Note}}\textsc{:}$  Partial transfers less than \$2,000 will result in a processing fee of \$50

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## **DELIVERY INSTRUCTIONS**

☐ Regular Mail	☐ Overnight Mail	☐ Wire (additional \$25 fee applies)	
IPS 8226 Douglas Avenue, Suite 520	IPS 8226 Douglas Avenue, Suite 520	Third Coast Bank SSB 20202 Hwy 59 N Ste. 190 Humble, TX 77338	
Dallas, TX 75225	Dallas, TX 75225	ABA Number: <b>113094149</b>	
Make check payable to: Liberty Trust Company, Ltd., Custodian	Make check payable to: Liberty Trust Company, Ltd., Custodian	Liberty Trust Company, Ltd. 101 S. Reid St. Ste. 307 Sioux Falls, SD 57103	
FBO: (client's name) IRA #	FBO: (client's name) IRA #	Acct. Number: 1000019370	
		Ref: (client's name) IRA #	
	and other related documents must reflect the number, and Liberty Trust Company, Ltd.'s		
Tax Identification Number: 90-0909159	Liberty Trust Company, Ltd., Custo	odian FBO: (client's name) IRA #	
ACCOUNT OWNER TRANSFER AUTHOR	IZATION AND SIGNATURE		
account of the type designated in section	s set forth in this Account Transfer Request n 1 of this form. I acknowledge that I unders for the Account Transfer of assets listed in	stand the rules and conditions regarding Ac-	
I UNDERSTAND that if funds are wired to count unless I have prepaid such fee.	o Liberty Trust Company, Ltd. (LTC), LTC w	ill deduct the incoming wire fee from my ac	
I HEREBY AUTHORIZE the present Cust	odian to deliver my cash and/or assets as ne	oted above.	
Check with your current Custodian to see antee is required. A Medallion Signature G a brokerage firm, bank, or other financial instit will not provide a Medallion Signature Guaran	uarantee may be obtained at ution. Liberty Trust Company	Medallion Signature Guarantee	
Signature: X			
Date: X			
_			
LETTER OF ACCEPTANCE BY LIBERTY	Trust Company, Ltd.		
	ne transfer described above as Successor C hed on behalf of the Account Owner named		
Ву:	Date:	Date:	
Printed Name:	Title: <u>Auth</u>	Title: Authorized Signer	

V101516 Account Transfer ~ page 2