FORTIS BANK

IRA Transfer Form

Form Purpose	Use this form to request a direct transfer of cash and/or assets from another IRA custodian to your Fortis Bank IRA account.
Assistance	Please email iraservices@fortisbankus.com. We are available 9:00 a.m. to 5:00 p.m. MT, Monday through Friday.
Instructions	**Before You Submit This Form**: • Liquidate any non-cash assets that are not being transferred in-kind. Fortis Bank cannot accept publicly traded securities. • Confirm with your current IRA custodian whether an ink-signed original or medallion signature guarantee are required, or if a certified digital signature is acceptable.
Fees	Please refer to the current Fortis Bank Self-Directed Retirement Product Fee Schedule for details.
Timelines	Transfers of cash can take from 5 to 30 business days, depending on the responsiveness of the current custodian. Transfers of assets-in-kind may take from 2 to 10 weeks.
Important Notes	IRA transfers must be initiated by the receiving custodian (Fortis Bank). An IRA-to-IRA transfer is non-taxable and may include cash or non-traditional assets in-kind like real estate or non-public stock. Fortis Bank cannot accept the transfer of publicly traded securities. Transfers must be between accounts with the same tax-type, such as Roth to Roth or Traditional to Traditional. The account owner must also be the same on both accounts, except for transfers to an ex-spouse per a divorce decree. You may transfer an inherited IRA, so long as the receiving account is also an inherited IRA with the same original account owner. Do not use this form to request a rollover from a Qualified Employer Plan. Initiate a rollover request with your current plan administrator and submit a Rollover Certification form to document the deposit to your Fortis Bank IRA.

Delivery Instructions

Secure Upload	Regular Mail	Overnight Mail	Fax
https://fortisbankus.com/secure-upload	Fortis Bank Attn: Funding PO Box 217270 Salt Lake City, UT 84171	Fortis Bank Attn: Funding 6975 Union Park Ave. Suite 180 Midvale, UT 84047	720-616-4030

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FORTIS BANK

Account Owner

Full Name

Email Address | Daytime Phone

Fortis Account Number | Social Security Number (last 4)

IRA Type

◯ Traditional IRA ◯ Roth IRA ◯ SEP IRA ◯ SIMPLE IRA

Current Custodian Information

The account that assets are being transferred from.

Custodian Name

Custodian Address

Account Number | Phone | Fax

IRA Type

◯ Traditional IRA ◯ Roth IRA ◯ SEP IRA ◯ SIMPLE IRA

Inherited Account? | If yes, deceased account holder full name

☐ Yes

Transfer Details

Liquidation requests must be initiated with your current custodian prior to transferring.

Transfer Type

◯ **Full** | Close account, transfer all cash ◯ **Partial** | Keep account open, transfer all cash

◯ **Partial** | Keep account open, transfer specified cash $_____

Note: Fortis Bank only accepts in-kind transfers of existing IRA-owned membership interest in an LLC or IRA-owned beneficial interest in a Trust. To perform an in-kind transfer, please contact iraservices@fortisbankus.com for more details.

Transmit Options

How would you like this request sent?

◯ Fax (default)

◯ First Class USPS Mail

◯ Overnight ($30 fee) *Physical Address Required*

Delivery Method

How would you like your custodian to deliver cash/assets to Fortis?

◯ **Wire to:**

Bank:	Fortis Bank
Address:	6975 Union Park Avenue Suite 180 Midvale, UT 84047
Routing/ABA:	107006428
Credit Account:	1010054813
Account Name:	Fortis Bank
Further Credit/Memo:	FBO {Client Name &Account #}

◯ **Check payable to:**

Fortis Bank FBO {*Account Owner*} {*IRA Type*}

i.e. **Fortis Bank FBO John Public Roth IRA**

Put Account# in memo field.

Send to regular mail or overnight address listed below.

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FORTIS BANK

Medallion Signature Guarantee Special certification stamp guaranteeing your signature. Check with your *current custodian* to determine if a medallion is required.	
Signature	By signing below, I certify that the information on this form is true and correct to the best of my knowledge, and that Fortis Bank and the releasing custodian may rely on the information provided. I acknowledge that I am solely responsible for ensuring this is an eligible transfer per IRS rules. I understand that, as a passive custodian, Fortis Bank does not provide tax, legal, or investment advice, and that I should seek guidance from a competent advisor regarding such matters. I agree to indemnify and hold harmless Fortis Bank from any consequences related to this transfer. Signature ➡ | Date *A **hand signature** is required by most custodians. Digital signatures/stamps may be rejected, resulting in delay.*

FOR OFFICE USE ONLY: Acceptance of Receiving Custodian

Fortis Bank accepts the appointment as successor custodian on behalf of the depositor and requests the transfer and/or liquidation of assets as instructed above.

Authorized Signature	Date

Delivery Instructions

Secure Upload

https://fortisbankus.com/secure-upload

Regular Mail

Fortis Bank
Attn: Funding
PO Box 217270
Salt Lake City, UT 84171

Overnight Mail

Fortis Bank
Attn: Funding
6975 Union Park Ave.
Suite 180
Midvale, UT 84047

Fax

720-616-4030

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