

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 selfdirected@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 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	The following fees may apply to this transaction: \$15.00 Inbound wire fee. \$75.00 Re-registration of non-cash asset in-kind. Fees will be debited from the IRA. Please refer to the current Fortis Bank <i>IRA Custodial Fee Schedule</i> 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 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 <i>Rollover Certification</i> form to document the deposit to your Fortis 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

Helpful to Know. Use this form to request a direct transfer of cash and/or assets from another IRA custodian to your Fortis Bank IRA account.

Before you submit this form. Contact your current custodian to:

- Liquidate any non-cash assets that are not being transferred in-kind. Fortis cannot accept publicly traded securities.
- Confirm whether an ink-signed original or medallion signature guarantee are required, or if a certified digital signature is acceptable.

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 IRA.

1: Account Owner	Full Name				
	Email Address		Daytime Phone		
	Fortis Account Number		Social Security Number (last 4)		
2: 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					
3: Transfer Details Liquidation request must be initiated with your current custodian prior to transferring.	Complete - All cash and assets in-kind. Close account.				
	Partial - List asset(s) in the required section below.				
	Asset Description (cash, LLC, real estate, etc.)			Amount (All, # of shares, or value)	
	Cash				
4: Transmit Options How would you like this request sent?	Fax (default)				
	First Class USPS Mail				
	Overnight (\$30 fee) <i>Physical Address Required</i>				



3: 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.				
6: Medallion Signature Guarantee Special certification stamp guaranteeing your signature. Check with your <u>current custodian</u> to determine if a medallion is required.						
7: 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. <table border="1"><thead><tr><th>Signature</th><th>Date</th></tr></thead><tbody><tr><td></td><td></td></tr></tbody></table> A hand signature is required by most custodians. Digital signatures/stamps may be rejected, resulting in delay.		Signature	Date		
Signature	Date					
						

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

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