

Date: [Current Date]

To:

[Current Financial Institution Name]

[Current Institution Address]

[City, State, Zip Code]

Subject: Instruction to Close Roth IRA and Initiate Direct Rollover

Account Holder Information:

Name: [Your Full Name]

Account Number: [Your Current Roth IRA Account Number]

Social Security Number: [Last 4 Digits or Full SSN as required]

Dear Customer Service Department,

Please accept this letter as formal authorization to close my Roth Individual Retirement Account (IRA) referenced above. I wish to perform a direct institution-to-institution rollover of the entire account balance to a new Roth IRA held at [Receiving Institution Name].

Liquidation Instructions:

Please liquidate all holdings within the account and transfer the total cash balance. Do not withhold any taxes from this distribution as it is a direct rollover.

Delivery Instructions:

Please issue a check made payable to "[Receiving Institution Name] FBO [Your Name]" and mail it to the following address:

[Receiving Institution Name]

[Receiving Institution Mailing Address]

[City, State, Zip Code]

Attn: Rollover Department

If there are any closing fees or final administrative costs, please deduct them from the account balance prior to the final disbursement. Once the funds have been transferred, please close the account permanently.

If you require additional documentation or have questions regarding this request, please contact me at [Your Phone Number] or [Your Email Address].

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]