

**Date:** [Current Date]

**To:**

[Financial Institution Name]

[Address]

[City, State, Zip Code]

**Subject:** Instruction to Close SIMPLE IRA Account and Distribution for Rollover

**Account Holder Information:**

Name: [Your Full Name]

Account Number: [Your SIMPLE IRA Account Number]

Social Security Number: [Your SSN]

To Whom It May Concern,

Please accept this letter as my formal instruction to close the SIMPLE IRA account referenced above. I am requesting a total distribution of all assets in this account for the purpose of a rollover.

**Distribution Instructions:**

- Liquidate all holdings and issue a check for the full balance.
- Make the check payable to: [New Institution Name] FBO [Your Name].
- Do not withhold any federal or state income taxes from this distribution, as it is intended for a direct rollover.

**Mailing Instructions:**

Please mail the check to the following address:

[New Financial Institution Name]

[Attn: Department/Contact Name]

[Mailing Address]

[City, State, Zip Code]

I understand that if this account has been open for less than two years, specific IRS rules regarding rollovers apply. I certify that I have met the necessary requirements for this transaction.

Please contact me at [Your Phone Number] if you require further information to complete this request.

Sincerely,

[Your Signature]

[Your Printed Name]