

Date: [Current Date]

TO (Delivering Institution):

[Name of Resigning Trustee/Custodian]

[Address]

[City, State, Zip Code]

[Account Number]

FROM (Receiving Institution):

[Name of Successor Trustee/Custodian]

[Address]

[City, State, Zip Code]

[New Account Number, if available]

RE: Trustee-to-Trustee Transfer of IRA Assets

To Whom It May Concern,

Please accept this letter as authorization to perform a direct trustee-to-trustee transfer of the assets held in the Individual Retirement Account (IRA) mentioned above. This transfer should be processed as a non-taxable event and not as a distribution to the account holder.

Transfer Instructions:

- **Asset Selection:** [Total Balance] OR [Partial Amount: \$_____]
- **Liquidation:** [Liquidate all assets to cash] OR [Transfer assets in-kind]

Check Delivery Instructions:

Please make the check payable to: **[Successor Trustee Name] FBO [Your Name]**.

Please mail the check and a copy of the final statement to the "Receiving Institution" address listed above.

Account Holder Information:

Name: [Your Full Name]

Social Security Number: [Your SSN]

Phone Number: [Your Phone Number]

Signatures:

[Your Signature] Date: [Date]

Acceptance by Successor Trustee:

[Name of Successor Trustee] hereby agrees to accept the assets described above and will serve as the successor trustee/custodian for the IRA of the individual named above.

[Authorized Signature of Receiving Institution] Date: [Date]