

TRANSFER REQUEST FORM Effective 09/2023

Account Per Form) Name of Current Custodian/Trus	tee		Accou	unt Owr	ner's Name				
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Physical Address Line 1			CNB Account #						
Physical Address Line 2			Account Owner's Phone Number						
City ST	Zip		Ассоц	unt Own	ner's Social	Security Number	Date of Birth	1	
Phone Number of Current Custodian/	Trustee		For O	ffice Us	e Only				
Account Number at Current Cust	odian/Trustee								
RANSACTION TYPE									
	se contact your employer fo current custodian to see if the						a W-4R.		
From:	_					То:			
	☐ Traditional IRA ☐ 401k*			☐ Traditional IRA					
Roth IRA - Year Opened**				SEP IRA					
☐ SEP IRA ☐ Profit Sha			_						
☐ Inherited Traditional IRA	_					☐ Inherited Roth I			
☐ Inherited Roth IRA Please contact your employer for		Other							
Indicate the year the original Ro * Current Custodian/Trustee is r RANSFER/ROLLOVI I hereby direct you to trans	esponsible for determining ER/CONVERSION	2-year eligibi	ility for	transfe	er from a S	SIMPLE IRA to a Trac			
			R Partial Transfer—Check a box below						
Liquidate all assets including money market/cash account			Liquidate from Money Market/Cash Account in the amoun						
and send proceeds to CNB (Please check with current custodian to make			of \$						
sure they will accept this form as authorization to liquidate your account.) Transfer investments in-kind plus all cash						nitting this request.)	e casii is avallable		
(Statement is Required)					6 . 11 .		et a contracti		
Liquidate and transfer proceeds at maturity				Please follow individual instructions below:					
Please follow individual instr	uctions below:		L						
Please indicate dividend option in right hand column							Dividend	Option	
Liquidate Re-Register*** (in-kind)	Investment Name				Specify Dollar Amount, # of Shares, or "All"		Reinvest Cash		
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<u> </u>	-								
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5. COMPLETE ONLY IF TRANSFERING PRECIOUS METALS:	
If transferring Precious Metals to CNB, your initials are required on the line below. I acknowledge that I have read and fully understand the Precious Metals Disclosures & Instructions and the Precious Metals Fee (initial) Schedule found on cnbcustody.com. Precious Metals Depository - If no selection is chosen, the Delaware location of DDSC will be assumed: Delaware Depository (DDSC) Delaware Location Delaware Depository (DDSC) Nevada Location International Depository Services (IDS) Delaware Location International Depository Services (IDS) Texas Location Precious Metals Storage Type at Depository - If no selection is chosen, non-segregated will be assumed if using DDSC: Non-Segregated (assets are mixed with assets of others) Non-Segregated is not available at IDS Segregated (assets are held separately from other investor's assets - additional fees apply) Segregation of silver is not available at DDSC	
6. SEND TRANSFER REQUEST FORM TO CURRENT CUSTODIAN BY:	
CNB will submit this transfer request form to the current custodian by fax or by USPS if fax is not available.	
Fax Number: Attn:	
7. RETURN FUNDS TO CNB BY:	
Please send checks by regular mail unless a box is marked below. Please overnight funds to CNB by Overnight Carrier Federal Express Billing # Billing Zip Code Please wire funds to CNB. I understand that fees will be charged for this wire and will be deducted from the amount received. Please refer to the CNF Fee Schedule for wire fee. For delivery of cash and/or investments please see the attached CNB Delivery Instructions.	NB
8. SIGNATURE OF ACCOUNT OWNER:	
I have established an IRA with Community National Bank. I understand it is my responsibility to determine my eligibility for all transfers, conversions are direct rollovers. I have obtained my own tax and/or legal advice that may be necessary. I agree to indemnify and hold harmless Community National Bank against any and all situations arising from an ineligible transfer, conversion or direct rollover. I acknowledge that penalties may be incurred due to the premature liquidation of any investments. NOTE: To avoid processing delays, please check with your current custodian/trustee to determine if they require a	
Signature Medallion Guarantee in order to process your request. If a Signature Medallion is required, please obtain this prior to submitting the request to Community National Bank.	
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