



ROTH IRA CONVERSION FORM

Account Owner Information:

Full Legal Name: _____

Date of Birth (MM/DD/YYYY): _____ U.S. Social Security Number (SSN): _____

Address of Record: _____

City: _____ State: _____ Zip Code: _____

Primary Phone Number: _____ Email Address: _____

Conversion to ROTH IRA:

Convert my IRA number: _____ to my Roth IRA number: _____

I have satisfied my Required Minimum Distribution

If you will reach RMD age or older by December 31st of the current year, a Required Minimum Distribution (RMD) must be satisfied prior to requesting a Roth conversion. RMD age is 70 ½ if born on or before June 30, 1949. If you were born after June 30, 1949 and attained age 72 before 2023, RMD age is 72. If you attain age 72 in 2023 or later, RMD age is 73. A valid Roth IRA is required to be established prior to completing a Roth conversion.

Conversion Information:

I wish to convert my entire account to my Roth IRA.

Partial conversion of the following assets.

Cash in the amount of: _____

Signature: _____

Date: _____