

### 1. Participant Details

Participant Name  
John Doe

Mailing Address (must match address on file)

Street 122 E Butler Avenue  
City Ambler  
State PA  
ZIP 19002

Soc. Sec. No. 120-00-0000  
Cama Acct. No. T280101-01  
(Leave blank if new account)

**CamaPlan Account Holder's Name. MUST** match name on file at CamaPlan and the sending financial institution.

**Your personal information. MUST** match address of record at CamaPlan.

### 2. Transferring Account Info

Custodian of Account to be Transferred  
Fidelity

Company Address

Street P.O. Box 770002  
City Cincinnati  
State OH  
ZIP 45277-0090

Contact Name George John  
Contact Phone 50698100

Name on Account to be Transferred  
John Doe  
Account No. 50698100

**Name and address of sending financial institution** for account you will roll over (e.g. Fidelity, Vanguard, Schwab). Provide contact name and phone at sending financial institution for assistance.

**Name (usually your name) and account number (REQUIRED)** for the account at the sending financial institution. **CamaPlan REQUIRES** a recent statement from the sending financial institution for the account you are rolling over.

### 3. Transfer Details

This is a: (choose A or B)

**A. Complete transfer**  
(choose one option below)

Liquidate all assets and transfer proceeds to CamaPlan

Transfer all assets "in-kind" along with cash:

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

OR

**B. Partial transfer**  
(choose one option below)

Send \$ \_\_\_\_\_ in cash to CamaPlan

Send these assets in-kind to CamaPlan:

1. \_\_\_\_\_  
2. \_\_\_\_\_

How would you like your cash to be sent FROM your current custodian?

Check  
 Wire (\$10 incoming wire fee)

How would you like us to submit this transfer request?

Regular Mail  
 Express Mail/Overnight \*  
 2-Day Courier \*  
 Fax to:  
Fax Number \_\_\_\_\_

\*additional fees may apply, see fee schedule

**Transfer Details Option A:** Select this option if you are closing your other account and bringing all proceeds to CamaPlan.

**Selecting Liquidate all assets and transfer proceeds to CamaPlan** instructs the sending institution to convert all assets to cash and transfer to CamaPlan. Not all institutions will accept these written instructions. You may need to convert assets to cash before initiating your transfer.

**Selecting Transfer all assets "in-kind" along with cash** instructs the sending institution to transfer the assets and cash in your account holdings 'as is'.  
*NOTE: In-kind transfers require retitling. Contact the sending institution or your financial advisor to initiate this process.*

**Transfer Details Option B:** Select this option if you are transferring a portion of the cash and/or assets in the sending institution's account to CamaPlan. Be sure to put down the exact amount of cash you wish to bring to CamaPlan.

**Selecting Sent these assets "in-kind" to CamaPlan** instructs the sending institution to transfer the named assets 'as is'.  
*NOTE: In-kind transfers require retitling. Contact the sending institution or your financial advisor to initiate this process*

**Fund Transfer:** Select how you want your cash sent to CamaPlan. Wire transfers typically clear in 24 hours. Checks can take 3-5 days to clear after CamaPlan receives them by mail. **NOTE:** CamaPlan charges \$10 for incoming wire transfers.

#### 4. Transfer Type

- Check here if this is an inherited IRA.  
 Check here if this is a Conduit IRA.

I am transferring FROM:

- |  |                                     |
|--|-------------------------------------|
| <input type="checkbox"/> Traditional IRA | <input type="checkbox"/> Simple IRA |
| <input type="checkbox"/> Roth IRA        | <input type="checkbox"/> HSA        |
| <input type="checkbox"/> SEP IRA         | <input type="checkbox"/> ESA        |

- I am attaching a recent statement for the account I am transferring FROM.

I am transferring TO:

- |  |                                     |
|--|-------------------------------------|
| <input type="checkbox"/> Traditional IRA | <input type="checkbox"/> Simple IRA |
| <input type="checkbox"/> Roth IRA        | <input type="checkbox"/> HSA        |
| <input type="checkbox"/> SEP IRA         | <input type="checkbox"/> ESA        |



#### 5. Signature

I understand that if this transfer is occurring during or after the calendar year during which I attain the age of 70½, the required minimum amount determined under this Custodial Account is still required to be distributed. I further understand that the current Trustee/Custodian is not responsible for making this distribution prior to the transfer. I accept full responsibility for satisfying the required minimum distribution applicable to this Custodial Account by withdrawing sufficient amounts from another Custodial Account prior to the deadline for receiving minimum distributions for the calendar year of the transfer. If this transfer leaves the transferor Custodial Account in one year but does not reach the transferee Custodial Account until the following year, I understand that this will be an "outstanding transfer" as of December 31st. The new Custodial Account must "deem" that the transfer was received as of the prior December 31st for determining any required minimum distribution from the transferee Custodial Account for the year that the transfer was received. I will inform the transferee Custodial Account Trustee/Custodian of any such outstanding transfer.

*John Doe*

CamaPlan Account Holder's Signature

Date

**NOTE:** Some financial institutions have special requirements for transfers. These can include original documents and medallion signature guarantees. If you are unsure, contact your sending institution's and ask about NON - ACAT TRANSFER. If CamaPlan does not meet your sending institution's requirements, transfer of your funds to CamaPlan may be delayed.

**Select type of account you have at CamaPlan.** See rollover chart for what types of accounts can be rolled over to your CamaPlan account [https://www.irs.gov/pub/irs-tege/rollover\\_chart.pdf](https://www.irs.gov/pub/irs-tege/rollover_chart.pdf) CamaPlan **REQUIRES** a recent statement from the sending financial institution for the account you are rolling over.

**Medallion Signature Guarantee:** Some sending financial institutions require Medallion Signature Guarantees, a special certification stamp that guarantees the authenticity of signatures for financial transactions. Information on Medallion Signature Guarantees may be found at: <https://www.camaplan.com/resource-center/transfer-rollover-rules/>

**For Accepting Organization:** Our organization agrees to serve as the Administrator for the account of the above-named individual, and as Administrator, we agree to accept the assets being transferred hereunder. CAMA Self-Directed IRA, LLC on behalf of the Custodian.  
**CAMA Self-Directed IRA, LLC on behalf of the Custodian.**

Signed

Date