

When to use this form:

For transferring funds within similar accounts at CamaPlan:

Roth → Roth
Traditional → Traditional / SEP / SIMPLE*
SIMPLE → Traditional* / SEP* / SIMPLE
SEP → Traditional / SEP / SIMPLE*
HSA → HSA
ESA → ESA

*after two years

NOT for use with 401(k), 403(b), 457, or TSP accounts.

NOT for transfers from a pre-tax IRA to a Roth IRA.

To process your Transfer Request:

- 1. CAREFULLY FILL OUT ALL SECTIONS OF THIS TRANSFER FORM**
Incomplete forms will delay processing.
- 2. SUBMIT COMPLETED TRANSFER FORM TO CAMAPLAN**

If you would like to have your paperwork reviewed prior to submitting:

call: (866) 559-4430
or email: Operations@CamaPlan.com

Submit your Internal Transfer Form:

- Fax: (973) 302-8622
- Email: Operations@CamaPlan.com
- Mail: CamaPlan
122 E. Butler Ave, Suite 100
Ambler, PA 19002

What's next?

Once your Transfer Form has been submitted, we will process within 1-2 business days.

You will receive a confirmation email once your transfer has been processed.

1. Account Info

Participant Name

I am transferring FROM:

Account No.

- | | |
|--|-------------------------------------|
| <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 transferring TO:

Account No.

- | | |
|--|-------------------------------------|
| <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 |

2. Transfer Details

This is a: (choose A or B)

A. Complete transfer

(choose one option below)

I authorize CamaPlan to close the existing account upon transfer.

OR

I wish to keep the existing account open (accounts you wish to keep open will have a balance of \$1.00 and will incur no annual fees if the balance remains at \$1.00)

OR

B. Partial transfer

Cash \$

Transfer these assets in-kind:

1.
2.

3. Signature

By signing below, I authorize this transfer between my accounts.

CamaPlan Account Holder's Signature

Date