



# IRA TRANSFER REQUEST

For funding IRA accounts with  
Solera National Bank as custodian

Request for Transfer to:

Solera National Bank  
Attn: IRA Transfers  
P.O Box 876  
Cedar City, UT 84720  
(303) 937-6426

**Instructions:** Fill out each section completely, then read and sign the acknowledgement to certify the request. Please be aware that information entered incorrectly may delay your transfer.

## SECTION 1 SOLERA PLAN INFORMATION

Solera IRA Type: \_\_\_\_\_ Solera IRA Account Number: \_\_\_\_\_

Owner Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Owner Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

## SECTION 2 RELEASING INSTITUTION/CUSTODIAN INFORMATION

Name of Releasing Custodian: \_\_\_\_\_ \*Fax Number: \_\_\_\_\_

Releasing Custodian Plan Type: \_\_\_\_\_ \*For internal use only

Releasing Custodian Plan Number: \_\_\_\_\_

## SECTION 3 TRANSFER INSTRUCTIONS

Releasing Custodian Plan Type to Solera Plan Type: \_\_\_\_\_

Transfer Overview (details in Section 4): \_\_\_\_\_

Deliver transfer via the following method(s) (Check all that apply):

Wire Transfer      Check      In-Kind Asset Documentation

**Important:** All funds *must* be made payable to “[CUSTOMER NAME], [IRA TYPE & ACCOUNT #] held in custody by Solera National Bank.” We *cannot* accept any funds addressed directly to the customer without listing Solera National Bank as the custodian. All In-kind Assets must be retitled to the listed entity.

Continue to page 2 for assets description and authorization signatures.



**Cash Funds to Transfer** *(do not include value of in-kind assets):*

- Full Balance Transfer      Approximate Amount: \$ \_\_\_\_\_  
 Partial Transfer              Exact Amount: \$ \_\_\_\_\_

**In-Kind Assets to Transfer:**

*Important: Solera National Bank accepts only LLCs and Trusts as In-Kind Assets under an IRA. All other in-kind assets must be owned and properly titled in the name of the listed entity.*

Asset: \_\_\_\_\_ Type: \_\_\_\_\_ Approx. Value: \_\_\_\_\_  
 Asset: \_\_\_\_\_ Type: \_\_\_\_\_ Approx. Value: \_\_\_\_\_  
 Asset: \_\_\_\_\_ Type: \_\_\_\_\_ Approx. Value: \_\_\_\_\_

I certify the information I have provided is true, correct, and complete, and the Custodian may rely on what I have provided. I understand I am responsible for ensuring I am eligible to authorize this Transfer, and I assume all responsibilities for any consequences as a result of my actions. I irrevocably elect to designate this deposit as a transfer. I will indemnify and hold the transferring Custodian and Solera National Bank harmless from any consequences related to executing my directions. I have been advised to seek legal and tax advice and have not been provided any such advice from Solera National Bank.

**By signing below, the requestor acknowledges reading, understanding, and agreeing to all of these provisions and authorizes this transfer. By signing below, Solera National Bank agrees to accept this transfer of assets into the specified retirement plan for the participant’s benefit.**

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Requestor Name	Requestor Signature	Date

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Solera Bank Representative Name	Solera Bank Representative Signature	Date



Medallion Signature Guarantee Stamp

*Where required, the above signature authorization has been guaranteed by an Eligible Guarantor Institution, such as a commercial Bank, Trust Company, Securities Broker/Dealer, Credit Union, or Savings Association participating in a Signature Guarantee Program approved by the Securities Transfer Association, Inc. As per regulations, no other form of signature verification can be accepted.*