

# IRA TO NON-RETIREMENT ACCOUNT TRANSFER FORM

## INSTRUCTIONS:

1. Complete the attached IRA TO NON-RETIREMENT ACCOUNT TRANSFER Form
2. Sign the form
3. Mail the completed, signed form to:

Please send to: **Regular Mail**

Primerica Shareholder Services  
P.O. Box 534485  
Pittsburgh, PA 15253 – 4485  
Client Services: (800) 544-5445

**Overnight Mail**

Primerica Shareholder Services  
Attention: 534485  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262

**Fax services: If your request does not require a signature guarantee, additional documentation or other fund requirements, you may fax this request to (833) 748-3938**

You may use this form to transfer assets from your IRA account with Primerica Shareholder Services (PSS) to establish and fund a non-retirement account. The transfer must be within the same share class and fund company.

If you do not have an existing non-Retirement Account with the registration you desire, you must complete the appropriate New Account Application for the type account you wish to establish. You must contact a Primerica Financial Services Representative for assistance in completing the New Account Application and the Customer Identification Form.

You may not use this form or instructions from this form to remove an excess contribution (use Form POL-42), or take an RMD distribution, (use Form POL-14), request a Death Distribution, or in case of Divorce. Please use the appropriate distribution kit for Death, or in case of Divorce

## SECTION 1 -Transfer Request Options

Please check the appropriate box to indicate how we are to process your transfer request. Do you want to transfer all the shares in all fund positions in your retirement account to a new or existing account? Do you want a specific number of shares transferred from your retirement account or do you want a specific dollar amount transferred? Please indicate from which fund position we are to transfer a specific share or dollar amount. Please provide the redemption reason for this transfer. **Account Options (i.e. Pre-Authorized drafts will not be copied to the new/existing account unless you notify PSS to establish the option on the new/existing account).**

**NOTE: Investments will be moved “in kind” to your existing account, that is the same fund(s) currently held in the account will be moved to your existing account. You should speak with your PFSI Agent for assistance in determining what if any changes should be made after the transfer to your name is complete.**

## SECTION 2 -Types of Accounts

Please indicate the type of account you wish to establish by checking the appropriate box. If your account is already established, please provide your existing account number. If you are establishing a new account with Primerica Shareholder Services (PSS), please check the box, complete and attach the appropriate New Account Application to this form and mail to PSS. You must contact a Primerica Financial Services Representative for assistance in completing the application and Customer Identification Form.

## SECTION 3 -Tax Withholding Options

**FEDERAL WITHHOLDING** - Please indicate your Federal Tax Withholding

- Check the box if you wish **10 % Federal Income Taxes withheld from your proceeds**. If the box is not checked, no taxes will be withheld.

**MANDATORY STATE WITHHOLDING** – If you elect to have federal income tax withheld and you reside in a state that requires mandatory state withholding, we are also required to withhold state income tax.

**VOLUNTARY STATE WITHHOLDING** – If you reside in a state that allows voluntary State Income Tax withholding, you may choose to have the state income tax withheld whether you have federal withholding or not. **Check the box if you wish to have state income tax withheld from your distribution proceeds.**

## SECTION 4 -Signature and Signature Guarantee

To transfer the assets from your retirement plan account to fund your non-retirement plan account, you must sign the Transfer Form-For IRA to Non Retirement Account. You will be required to provide a signature guarantee if:

You will not be the registered owner of the shares upon transfer to the new or existing account. Please provide a phone number where you can be reached if additional information is needed.

An original signature guarantee may be obtained from an officer of most financial institutions. A medallion signature guarantee is preferable. If the signature guarantee is NOT medallion, please provide the name and phone number of the person providing the signature guarantee for verification purposes.

**Please note that a notary public cannot provide a signature guarantee.** A signature guarantee is a warranty by the grantor that the signature is genuine, and that the person(s) signing is competent and authorized to sign.

