

# Tax Qualified Transfer Request



## To bring funds to NASA Federal

Use this form only if you have the specified tax qualified account open with NASA FCU. Need to open an IRA? Please contact us for assistance, 888-NASA FCU.

### PART 1. NASA FCU ACCOUNT HOLDER *Individual requesting the transfer*

NASA FCU Account Number	ACCOUNT TYPE (Select one):	
	<input type="checkbox"/> Traditional IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SEP IRA	
Name (First/M.I./Last)	Social Security Number	Date of Birth
Phone	Email Address	

### PART 2. CURRENT IRA TRUSTEE OR CUSTODIAN *Tell us about your account at your other institution*

Account Number	ACCOUNT TYPE (Select one):	
	<input type="checkbox"/> Traditional IRA <input type="checkbox"/> Roth IRA <input type="checkbox"/> SEP IRA	
Name of Financial Institution	Address	
City/State/ZIP	Phone	Fax Number

### PART 3. TRANSFER INSTRUCTIONS *Complete all that apply:*

- At Maturity Transfer Date \_\_\_\_\_
- Prior to Maturity\* Transfer Date \_\_\_\_\_ *\*I acknowledge penalties and/or fees that may be charged by current institution*
- Partial Transfer Amount \_\_\_\_\_
- Entire IRA Balance  This Transfer Will Close the Current IRA

### PART 4. REQUIRED MINIMUM DISTRIBUTION (RMD) INSTRUCTIONS\* *For IRA/SEP owners subject to annual distributions as per IRS requirements*

(Select one):

- I would like my RMD funds paid to me prior to sending funds to NASA FCU.
- I would like my current institution to hold any current year RMD amount(s) and pay them to me at a later date
- Transfer all funds (including RMD). I will be responsible for satisfying RMD amount(s).

### PART 5. SIGNATURES

I authorize the transfer of these tax qualified assets and certify that all information provided by me is true and accurate. I understand that I am responsible for determining that this tax qualified transfer qualifies under the rules that apply to such transfers and agree to comply with those rules. I understand that special rules apply to SIMPLE IRA to Traditional IRA transfers. I assume responsibility for any consequences that may result from this transfer. I understand that I am solely responsible for satisfying RMD amount(s) if applicable to these funds. If/when RMDs do apply, my failure to select an option above does not transfer this responsibility to NASA FCU. I agree that NASA FCU is not responsible for any consequences that may arise from executing this transfer request.

The custodian signing below agrees to accept the assets being transferred.

\_\_\_\_\_  
Signature of NASA FCU IRA Account Owner

\_\_\_\_\_  
Date (mm/dd/yyyy)

\_\_\_\_\_  
Notary Public/Signature Guarantee (if required by the current institution)

\_\_\_\_\_  
Date (mm/dd/yyyy)

\_\_\_\_\_  
NASA FCU Authorized Signature (Accepting Custodian)

\_\_\_\_\_  
Date (mm/dd/yyyy)

## Instructions to Complete Your Request

1. **Complete the form in its entirety and physically sign under Signatures. Please obtain Notary or Signature Guarantee if your current institution requires it to release your funds.**

2. **Return Form by:**

**Mail:**

***Overnight/Expedited:***

NASA Federal Credit Union  
Attn: Specialty Accounts  
500 Prince Georges Blvd  
Upper Marlboro, MD 20774

***Standard Mail:***

NASA Federal Credit Union  
Attn: Specialty Accounts  
P.O. Box 1588  
Bowie, MD 20717-1588

**Online Banking:** Log into Online Banking to send a secure message. In the top right, next to profile, click the message icon. Click "compose" then "attach files" option in the message center to attach a copy of the form and photo ID.

**Mobile Banking App:** Log into the Mobile App to send a secure message. In the bottom right, click "more." Click message center, click "compose" then "attach files" option in the message center to attach a copy of the form and photo ID.

**Fax:** Specialty Accounts 301-390-4525