



INDIVIDUAL RETIREMENT ACCOUNT (IRA) TRANSFER AUTHORIZATION

SECTION 1. (To be completed by the PenFed Member)

Form with fields: Date, Member Name, PenFed Member No., SSN, Name of Transferring Institution, Address of Transferring Institution, Transferring Institution IRA Account No.

SECTION 2. (Instructions to transferring institution to be completed and signed by the PenFed Member)

ATTENTION IRA ADMINISTRATOR:

Please accept this letter as your authorization to transfer: (check one alternative below)

- Checkboxes for: The balance of my IRA including accrued interest on... less applicable penalties or fees. or The sum of \$... from my IRA to Pentagon Federal Credit Union (PenFed).

Please make the check payable to:

Pentagon Federal Credit Union as custodian for the IRA of... whose account number is...

- The type of IRA I have is: Traditional, Inherited Traditional, SEP, Inherited SEP, Roth, Inherited Roth

Mail the check (if applicable) and a copy of this letter to:

PenFed Credit Union
Attention: IRA Department
PO Box 247009
Omaha, NE 68124-7009

If you inherited the IRA, please include the following: Decedent's Name, Date of Death, Decedent's SSN

(Depositor's Signature) (Depositor's Printed Name)

SECTION 3. (Designation of funds to be completed by member)

Upon receipt, deposit funds into: (check appropriate box(es))

Table with columns: IRA Certificate Term (\$1000 Minimum) (1-Year, 2-Year, 3-Year, 4-Year, 5-Year, 7-Year) and Account Designation (IRA Premier Account (\$10,000 minimum) Rollover/Transfer ONLY)

SECTION 4: PENFED USE ONLY

This is to certify PenFed has accepted the appointment as Successor Custodian of the IRA named above.

(Authorized Signature) (Date)