Roth Conversion Form

PO Box 9
Cedar City, UT 84721
Phone: 888-328-8008
Fax: 435-867-1042

Part 1 Account Owner Information

NAME *(as it appears in your plan)*	IRA EXPRESS ACCOUNT NUMBER	ACCOUNT TYPE BEING CONVERTED
EMAIL ADDRESS		PHONE NUMBER

Part 2 Conversion Information

Choose one of the following:

☐ NEW ROTH IRA *This is a conversion to a NEW Roth IRA. An account application must be attached to set-up your new Roth IRA.*	☐ EXISTING ROTH IRA *This is a conversion to an EXISTING Roth IRA.* *Existing Roth IRA Account Number: _____*

Choose one of the following:

☐ FULL CONVERSION *Convert all the assets held in the above account.*	☐ PARTIAL CONVERSION *Convert only the assets listed below.*

Asset Description	**Indicate Dollar Amount *(do not use percentages)***

A Fair Market Valuation (FMV) Form must be filled out (including supporting documentation) for each asset being converted.

Part 3 Certification and Acknowledgement

1. I certify that the information provided is true and correct to the best of my knowledge.
2. I certify that no tax advice has been given to me by the Administrator or Custodian.
3. This conversion is being made within 60 days after my receipt of funds from my Traditional IRA plan or Employer Sponsored plan, if applicable.
4. I hereby irrevocable elect, to treat this transaction as a conversion as permitted under the IRS Regulations.
5. It is recommended that I consult with my tax advisor before completing this transaction.
6. I acknowledge that the distribution and conversion transactions will be reported to the IRS.
7. I acknowledge that this conversion will be taxed in the calendar year it is completed.
8. I expressly assume the responsibility for any adverse consequences which may arise from this conversion request and I agree that the Administrator and/or Custodian shall in no way be responsible for those consequences.
9. I hereby release the Administrator and/or Custodian from any claim for damages on account of the failure of this transaction to qualify as a valid conversion.

Please read the disclosure above the signature line before signing and dating.

SIGNATURE	**DATE**