TRANSFER REQUEST

uDirect IRA Services, LLC
2522 Chambers Road, Ste 100
Tustin, CA 92780
Phone: (714) 460-5505
Fax: (866) 538-3539

1. IRA HOLDER'S NAME AND ADDRESS

First Name	MI	Last Name
Address		
City	State	Zip
Social Security Number	Date of Birth	
Home Phone		

2. CURRENT TRUSTEE OR CUSTODIAN NAME AND ADDRESS

Custodian Name		
Address		
City	State	Zip
Account Number	Phone	
Type [ ] Traditional [ ] Roth [ ] 401k [ ] Simple [ ] SEP [ ] _____		

3. TRANSFER INSTRUCTIONS

Transfer Amount	[ ] All [ ] Partial
Frequency	[ ] Once [ ] Other _____
Cash Transfer Method	[ ] Check [ ] Wire
Transfer To Account Type (Receiving account)	[ ] Traditional [ ] Roth [ ] 401k [ ] Simple [ ] SEP [ ] _____

4. CASH HANDLING INSTRUCTIONS

Check Transfer: Make the check payable as follows:
American Estate & Trust, LC FBO <Account Holder Name>

Wire Transfer: Bank Name: Wells Fargo
Account #: 3393886381
Routing #: 121000248
Account Name: American Estate & Trust, LC

5. ASSET HANDLING INSTRUCTIONS

Asset Description	Qty or Amount to be transferred	Liquidate Immediately	Liquidate At Maturity	Transfer In Kind
1.		[ ]	[ ]	[ ]
2.		[ ]	[ ]	[ ]
3.		[ ]	[ ]	[ ]
4.		[ ]	[ ]	[ ]

6. SIGNATURE

I authorize the transfer of the IRA assets in the manner described above and certify that all of the information provided by is correct and may be relied upon by the Trustee or Custodian.

I understand that I am responsible for determining my eligibility to transfer within the limits set forth by tax laws, related regulations and plan agreements. Further, I understand that a transfer from a SIMPLE IRA to SIMPLE IRA on a more frequent basis than monthly from a Designated Financial Institution, change in my transfer request outside my election period, may result in costs or penalties. I understand that special rules apply to SIMPLE IRA to Traditional IRA transfers. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree that the Trustee or Custodian shall in no way be held responsible.

_____ _____
(IRA Account Holder, Beneficiary or Former Spouse) (Date)

Place Medallion Signature Here

Please note that you should contact your current IRA custodian to determine if a medallion stamp is required.

7. ACCEPTING IRA CUSTODIAN

American Estate & Trust agrees to serve as the new custodian for the account of the above named individual. We agree to accept the assets being transferred.

Account Identification of Accepting IRA: _____

Account Type being accepted:
[ ] Traditional [ ] Roth [ ] 401k [ ] Simple [ ] SEP [ ] _____

Accepting Custodian Address:

American Estate & Trust, LC
6900 Westcliff Dr.; Ste. 603
Las Vegas, NV 89145
Phone: (866) 654-6111
Fax: (702) 974-2524
Email: info@trusteeamerica.com

_____ _____
(Authorized Signature of Accepting Custodian) (Date)