

TRANSFER OF FUNDS REQUEST FORM

WE MAKE
THE COMPLEX
SIMPLE

This form transfers funds from another institution to your Sterling account. Please fill out the following form, mail the original to your current IRA/FSA/HSA/MSA administrator where your funds are currently being held, and send a copy to:

Sterling
PO Box 71107, Oakland, CA 94612

STERLING ACCOUNTHOLDER INFORMATION

Name	SSN #	Sterling Account #	
Street Address	City	State	Zip
Date of Birth	Phone	Email	

TRANSFER REQUEST TO CURRENT CUSTODIAN / TRUSTEE

Present Custodian/Trustee Name	Account #	Phone Number	
Street Address	City	State	Zip

I authorize and direct you, my present IRA/FSA/HSA/MSA Custodian/Trustee, to transfer

All my funds Partial funds in the amount of \$ _____

in my IRA FSA HSA MSA account to Sterling.

I authorize and direct you to send my assets to my Sterling account as follows:

By check payable to Sterling, PO Box 71107, Oakland, CA 94612

SIGNATURE

I certify that I have or will establish an account with Sterling.

Signature

Date