



60-Day Rollover Designation

IMPORTANT INFORMATION

To initiate a 60-Day rollover request, please complete this form and include your check. Make checks payable to Directed Trust Company, FBO (your name) (Account Type). Be advised that not all accounts are compatible with each other. Please familiarize yourself with the [IRS's "Rollover Chart"](#) to determine if your rollover is compatible.

1. Account Owner Information

First Name: _____ MI: _____ Last Name: _____

Last 4 of SSN: _____ Date of Birth: ____/____/____ Phone Number: _____

Directed IRA Account Number: _____ Account Type: _____

2. Deposit Instructions

All 60-day rollover contributions will be applied to the current year, unless indicated otherwise by the account owner. (i.e. distributions taken in November or December could potentially be deposited in the following year.)

Cash/Check Amount (Do not include In-Kind Asset Value):

\$ _____ Traditional IRA For tax year: _____

\$ _____ Roth IRA For tax year: _____

\$ _____ Coverdell For tax year: _____

\$ _____ HSA For tax year: _____

\$ _____ SEP IRA For tax year: _____

Total Amount Enclosed: \$ _____ **Via:** Check ACH/Wire (Must be sent from the Account Owner)

If an asset is being rolled over from another account "In-Kind" and within 60 Days, please Identify the asset and notate the value in the deposit credit amount above. Additional instructions will be provided.

Asset: _____ Asset Value: \$ _____

The tax year is typically the year in which the rollover is being sent to our office. In the event you took a distribution from another account in December of a prior year and are re-depositing in January of the next year you will likely want to designate the prior year in which you took the distribution for the tax year.

3. IRA Rollover Certification

I hereby certify that this is a valid 60-Day rollover that meets all IRS regulations. I also certify that I have not executed another rollover from any other IRA in the past 12 months and that this rollover is being made within 60 days of distribution of the funds. I hereby irrevocably authorize the deposit of the rollover contribution and understand that I am fully responsible for the tax consequences of this transaction.

➤ _____
Account Owner Signature

Date

INVESTMENTS: NOT FDIC INSURED ■ NO GUARANTEE ■ MAY LOSE VALUE

[Secure File Upload](#)

Email Forms to:
Transfers@directedira.com

Send Mail to:
3033 N. Central Ave. Ste. 415
Phoenix, AZ 85012

Fax:
(602) 899-9641

Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation