Clear Form

WELLS FARGO Advisors

IRA Transfer Due to Divorce Request

Complete this form if you are required to transfer some or all of your IRA pursuant to a divorce. In order to move the assets as a non-tax reportable event from an IRA or Inherited IRA due to divorce, the movement must be completed as an IRA to IRA transfer. The Custodian will comply with a court order that orders the Custodian to divide an Inherited IRA. Attach a copy of the court-executed divorce decree or separation decree; you may need to also include the court-approved separate maintenance agreement or written document related to the decree and division of the IRA assets. Do not use this form for IRA distributions.

Please review the WFCS IRA Disclosure Statement and Custodial Agreement for more information about the IRA Custodian and the terms and conditions of the account.

Account Name	Account Number
IRA Type *(Select one)* ☐ Traditional ☐ Roth ☐ SEP/SAR-SEP ☐ SIMPLE ☐ Inherited Traditional ☐ Inherited Roth	
Recipient Name	

Transfer Instructions

The IRA Custodian is authorized to distribute as indicated below. Please select either a full transfer or a partial transfer, but not both.

☐ **Full Transfer.** Move all assets in kind.

☐ **Partial Transfer.** When selecting a partial transfer, specify the amount to transfer, or the securities to transfer, or both.

☐ **Amount $** ______________ of cash ☐ **Securities.** Specify the assets and quantities below.

Symbol/CUSIP	Quantity	Symbol/CUSIP	Quantity	Symbol/CUSIP	Quantity

Investment and Insurance Products are:
- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Symbol/CUSIP	Quantity	Symbol/CUSIP	Quantity	Symbol/CUSIP	Quantity

Method: ☐ Journal to another IRA

IRA Account Number ______________________ Account Name ______________________

☐ External transfer to an IRA (please attach the receiving firm's transfer paperwork with letter of acceptance)

Client Signature and Acknowledgment

I certify that I am the proper party to release payment(s) from this IRA and that all information provided is true and accurate. I further certify that no tax advice has been given to me by the IRA Custodian, my Financial Advisor, or the broker-dealer servicing my account. I expressly assume the responsibility for any tax implications and any adverse consequences which may arise from this withdrawal. I agree that the IRA Custodian and any of its affiliates may reasonably rely on my certification without further investigation or inquiry and shall not be liable for any misrepresentation of fact.

Signature of IRA Holder

Signature	Printed Name	Date Signed

Office Use Only: Client Authentication

Sub Firm #	BR Code	FA Code	Account Number

Account Holder Phone Number *(when call out is required)*	Account Holder Recognized By *(Select one)* ☐ ID Check ☐ Recognized Physically ☐ Recognized by Voice	
Account holder confirmed by two types of identifying information:		
Identification (1)	Identification (2)	
Name of Associate Who Authenticated	Date Authenticated	Time Authenticated

For Non-Electronic Signatures, Submit Form via Fax or Mail

Only for WellsTrade and Intuitive Investors Clients

Ensure all sections are complete and that the form is signed and dated.

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Questions: 1-800-872-3377