



# TRUSTEE TRANSFER AUTHORIZATION

## WHEN TO USE THIS FORM

Use this form to liquidate and transfer your IRA, Roth IRA or Coverdell Education Savings to The Juniata Valley Bank (JVB). Upon receipt of this form, we will contact your current IRA institution to arrange the transfer.

## INSTRUCTIONS AND GUIDELINES

There are two options for utilizing our online forms:

1. You may print this blank form, fill it out, sign it and mail it to JVB.
2. Or, you can type your information directly on the form below, print it out, sign it and mail it to JVB.

When completing the Trustee Transfer Authorization Form please follow these guidelines:

- **Complete all sections** of this form.
- **Sign and date** section 1 below
- **Mail** completed form to JVB (address below) and we will forward to your current Trustee for processing as a trustee transfer.

## CONTACT INFORMATION

Mailing Address	Telephone	Website
JVB C/O IRA PROCESSING PO Box 66 Mifflintown, PA 17059	(855) 582-5101	www.jvbonline.com

## RESIGNING TRUSTEE/CUSTODIAN INFORMATION

<b>Resigning Trustee/Custodian:</b>		
<b>Address:</b>		
<b>City:</b>	<b>State:</b>	<b>Zip:</b>

- IRA
- Qualified Plan Profit Sharing
- Qualified Plan Money Purchase
- Roth IRA
- Coverdell Education Savings
- SEP IRA



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## ACCOUNT OWNER INFORMATION

<b>Account Owner:</b>			<b>Account Number:</b>
<b>Address:</b>			<b>Maturity Date:</b>
<b>City:</b>	<b>State:</b>	<b>Zip:</b>	<b>Social Security Number:</b>
<b>Home Phone:</b>	<b>Business Phone:</b>		<b>Date of Birth:</b>

I have established an IRA at JVB, and have appointed JVB as successor trustee of my IRA presently held by you.

Please liquidate and transfer my IRA:  at maturity  immediately

Into the following IRA type at JVB:  IRA  ROTH  Coverdell  SEP

\_\_\_\_\_  
Date:

\_\_\_\_\_  
Participant's Signature

## PRESENT TRUSTEE/CUSTODIAL

Please complete if the participant is 70 ½ or older:

- Minimum distribution is being paid to participant based on the Uniform Life Expectancy Table
- Participant is taking more than the Required Minimum Distribution: \$\_\_\_\_\_ per \_\_\_\_\_
- Participant takes no distribution from this IRA

**Pursuant to IRS regulations, the transferring trustee/custodian certifies this transfer does not include any required distributions applicable to the above named customer for the current or any tax year.**

*JVB agrees to serve as successor trustee and accepts these funds.*

<b>Please forward completed form to JVB with your check payable to:</b>	<b>The Juniata Valley Bank FBO [customer's name]</b>
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Date: \_\_\_\_\_ Branch: \_\_\_\_\_ Authorized Signature: \_\_\_\_\_

Revised: 2015-09-08