

Contact Center: (800) 248-8447 | www.ForgeTrust.com

There are several ways to move cash into the Forge Trust IRA, and we have a dedicated team available to help you along the way.

1. TRANSFER FROM AN EXISTING IRA OF THE SAME TYPE

Effortlessly transition the client's existing IRA—Traditional, Roth, SEP, or SIMPLE—into their new account, of the same type.

1. Initiate the [Cash Only Transfer Request - Advisor DocuSign](#) and attach a recent account statement from the account being moved.
2. Once the client signs, the form will be automatically routed for processing. It's important to liquidate positions if necessary or if the transferring institution will do so automatically.

We'll coordinate with the client's current institution to initiate the transfer. Our processing typically takes 2-3 business days, but the timing for receiving funds depends on their current provider.

2. ROLLOVER FROM A QUALIFIED RETIREMENT PLAN e.g. 401(k), 403(b), or Pension Plan

The client should contact their current plan administrator to initiate the rollover.

1. Direct them to make the check payable to: **Forge Trust Co. [FBO: Client Name and Account Number]**.
2. Follow the delivery instructions on our [Deposit Notification- PDF](#).
3. Complete and submit the form to Deposits@ForgeTrust.com.

While timing depends on the current administrator, funds will typically be deposited into the Forge Trust account within 1-2 days of receipt, provided all details are complete. Note, there is a 5-business day hold on all checks.

3. CONTRIBUTE CASH TO THE IRA

The client can easily transfer funds from their personal bank account to their Forge IRA by following the guidelines in our Deposit Notification form. They can contribute via ACH, wire transfer, or by mailing a check.

Once initiated, to ensure accuracy, complete a [Deposit Notification- Advisor DocuSign](#) and send to the client for their signature. Remember, contributions are reported to the IRS and are subject to annual limits based on the IRA type and income, which may change yearly. Typically, funds will be deposited into the account within 1-2 days of receipt.

Need Additional Support?

Please visit our [Advisor Forms page](#) for all available forms.

If the funding methods outlined above don't fully meet your needs, such as an Indirect Rollover or a Roth Conversion, please don't hesitate to reach out to our expert team.

We're happy to help!

Contact us at:

Email: welcome@forgetrust.com

Phone: (800) 248-8447

Website: www.ForgeTrust.com