

There are several ways to get cash or existing investments into your Forge Trust self-directed IRA, and we have a dedicated team available to help you along the way.

## Transfer from an existing IRA of the same type

Traditional/SEP IRA to Traditional/SEP IRA or ROTH IRA to ROTH IRA

Complete and submit our [Transfer Authorization](#) form, along with the most recent account statement for the account you are transferring from. We will work directly with your existing institution to complete your request.

*This typically takes 3-7 business days to complete, depending on where you are transferring from.*

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## Rollover from a Qualified Retirement Plan, such as a 401K, 403B, or Pension Plan

This is also known as a “Direct Rollover”.

Contact your current plan administrator to request a rollover from your existing plan to your Forge Trust IRA. Instruct them to issue payment (or register investments) directly to Forge Trust for your benefit.

Once you have requested the rollover from your current plan administrator, submit a [Deposit Notification](#) form to Forge, along with a copy of your most recent account statement, in order to notify us of what we should be expecting to receive for your account.

*Timing for this is entirely dependent on your current administrator, but funds will be deposited to your Forge Trust account within 1-2 days of receipt, provided all the necessary information is available.*

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## Contribute cash to your IRA

Send cash from your personal bank account into your Forge IRA.

Refer to our [Deposit Notification](#) form for instructions on how to send a contribution, either electronically via ACH, wire or by mailing a check. Complete and submit this form at the same time you initiate your payment to ensure the contribution is correctly deposited to your account.

Contributions are reported to the IRS and subject to annual limits based on type of IRA, age, and income. The IRS sets these limits, and they are subject to change from year to year.

*Funds will typically be deposited into your account within 1-2 days of receipt.*

## Still not sure what you need?

If you have questions about the above funding methods, or none of them seem to meet your needs, please contact our team to discuss additional options, including an Indirect Rollover or a ROTH Conversion.

**Contact us at [Welcome@ForgeTrust.com](mailto:Welcome@ForgeTrust.com) or (800) 248-8447, Option 1  
[www.ForgeTrust.com](http://www.ForgeTrust.com)**