ForgeTrust

IN-KIND INVESTMENT OR EXCHANGE REQUEST

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

Complete Sections 2 & 3a to move assets from your IRA LLC to your IRA account. Complete Sections 3 & 3a of this form if you wish to exchange an asset currently held in your IRA with another asset.

☐ Invoice My Fees: I elect to be invoiced any applicable fees to pay online, via credit card or ACH. If enrolled in automatic payments, no additional action is required; otherwise, I understand I will have 5 days to make a one-time payment. If payment is not received, and there is insufficient cash to satisfy the amount due, my request will be canceled.

1. PERSONAL INFORMATION (*required field)

Should Forge Trust Co. need to contact you in regards to this request, your preferred method of contact is:

☐ Email

☐ Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* Last 4 Digits Only	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. IN-KIND INVESTMENT / ASSET MOVEMENT INSTRUCTIONS

I wish to move assets (select one):

◯ From my IRA to my IRA LLC	◯ From my IRA LLC to my IRA (*Please complete Section 3a AND also the Prohibited Transaction Questionnaire form.)
Name of IRA LLC	

Move the following assets:

Investment Name	Amount	Investment Name	Amount

Need to list more assets? Attach a separate page and write “SEE ATTACHED” at the top of this form. The asset(s) listed above will be re-registered; a re-registration fee per asset applies. See the *FEE SCHEDULE & FINANCIAL DISCLOSURE*.

For Real Estate and Trust Deeds:

If you are moving real estate and/or a trust deed, please prepare a deed and/or an Assignment of Deed of Trust to change the title and attach it to this form. We will execute the documents and return them to you for recording. Once the documents are recorded, please forward them to us as proof of re-registration.

For Publicly-Traded Securities:

If moving assets from your IRA to your IRA LLC: If the assets listed above are publicly-traded securities held in our brokerage account, please provide DTC instructions for your IRA LLC’s brokerage account so we can transfer the securities to the brokerage account:

Brokerage Firm Name	IRA LLC’s Brokerage Account No.	DTC No.**

***If you do not know the DTC number, please contact your brokerage firm for this information*

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3. EXCHANGE INSTRUCTIONS (Supporting documentation must be provided for all transfers.)

Name of asset to be exchanged	Amount/no. of shares	Exchange asset listed above with the following asset	Amount/no. of shares

*Section 3a

Name of Investment Sponsor/Managing Entity			
Address			
City	State/Province	Zip/Postal Code	Country
Phone Number XXX-XXX-XXXX	Fax Number XXX-XXX-XXXX	Email	
Exchange as of date (MM/DD/YYYY): _____			

4. ACKNOWLEDGMENT & PARTICIPANT SIGNATURE

Account Owner's Signature	Date (MM/DD/YYYY)
X	

Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
investments@ForgeTrust.com

Fax
(650) 745-2929

Regular mail
Forge Trust Co.
PO Box 2048
San Francisco, CA 94126

Overnight mail
Forge Trust Co.
4 Embarcadero Ctr, Floor 15
San Francisco, CA 94111

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