

# IRA HSA INVESTMENT CHANGE

The term IRA will be used below to mean Traditional IRA, Roth IRA, and SIMPLE IRA, unless otherwise specified. If this is an inherited IRA, the Account Owner is the beneficiary who has inherited this IRA.

## PART 1. ACCOUNT OWNER

Name (First/MI/Last) \_\_\_\_\_  
 Social Security Number \_\_\_\_\_  
 Date of Birth \_\_\_\_\_ Phone \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Account Number \_\_\_\_\_ Suffix \_\_\_\_\_

### ACCOUNT TYPE (Select one)

- Traditional IRA       Roth IRA       SIMPLE IRA  
 Inherited Traditional IRA       Inherited Roth IRA       HSA

## PART 2. TRUSTEE OR CUSTODIAN

To be completed by the trustee or custodian

Name \_\_\_\_\_  
 Address Line 1 \_\_\_\_\_  
 Address Line 2 \_\_\_\_\_  
 City/State/ZIP \_\_\_\_\_  
 Phone \_\_\_\_\_ Organization Number \_\_\_\_\_

## PART 3. INVESTMENT CHANGE INFORMATION

The current investment identified below will be liquidated immediately unless otherwise specified in the Special Instructions section.

### CURRENT INVESTMENT INFORMATION

Investment Description	Quantity or Amount to Move	Investment Number	Maturity Date	Earnings in Current Year	Loss of Earnings Penalty	Close Investment
_____	_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	_____	<input type="checkbox"/>

### SPECIAL INSTRUCTIONS

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### NEW INVESTMENT INFORMATION

Investment Description	Quantity or Amount to Invest	Investment Number	Term or Maturity Date	Interest Rate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## PART 4. SIGNATURE

I certify that all of the information provided by me is accurate and may be relied upon by the trustee or custodian. I authorize the change of investment described above.

**X** \_\_\_\_\_  
 Signature of Account Owner

\_\_\_\_\_ Date (mm/dd/yyyy)