



Cover Letter and Instructions for IRA Transfer Forms Package

Enclosed please find a Transfer Form Request Acceptance Letter (pg 1), and a Transfer Request for Tax-Qualified Accounts Tax Free Exchange (pg 2).

- 1) Please enter your name and annuity # in the appropriate spaces on the Transfer Form Request (pg1).
- 2) Please complete the Transfer Request For Tax-Qualified Accounts Tax Free Exchange (pg 2), inserting the name and address of the institution presently holding your **qualified account**, your current account number and type, and the amount you wish to transfer. Sign and date this form.
- 3) **After completing and signing these forms, return both of the forms to the FCSLA Life Home Office using the BLUE return envelope, or clearly mark your envelope "Attn: Annuity Dept."**

Please note: It is the responsibility of the member to follow-up with the current fund holder regarding the status of the transferred funds.

If you have any questions, please call our toll-free number at 1-800-464-4642, ext. 1065 and speak with the personnel in our Annuity Department.

Fraternally yours,

FCSLA Life Annuity Dept.

Enclosures



TRANSFER FORM REQUEST (Qualified) (page 1)

RE: _____
Proposed Annuitant / Owner

Please be advised that FCSLA Life will accept transfer monies

FOR THE BENEFIT OF: _____ and will transfer it to the
Proposed Annuitant / Owner

ACCOUNT NUMBER: _____ .
Annuity Number

Please make the check payable to FCSLA Life for the benefit of

_____ and send it to the following address:
Proposed Annuitant / Owner

FCSLA Life
Attn: Annuity Department
24950 Chagrin Boulevard
Beachwood, OH 44122

Please! Return a copy of the completed Transfer Request for Qualified Accounts – Tax Free Exchange with the transfer check.

If you have any questions, please call 1-800-464-4642 ext. 1022 and 1024 and speak with the personnel in our annuity department.

Sincerely,

Stuart L. Collins
National Treasurer

SLC

Enc.



Attn Current Fund Holder:

Please return a copy of this completed form with the Transfer Check.

**TRANSFER REQUEST FOR TAX-QUALIFIED ACCOUNTS
TAX FREE EXCHANGE (page 2)**

TO:

NAME OF THE PRESENT INSTITUTION

ADDRESS OF THE PRESENT INSTITUTION

SUBJECT:

NAME OF PROPOSED ANNUITANT / OWNER

PRESENT INSTITUTION ACCT #

ACCOUNT TYPE: IRA ROTH 401(k) SEP
 Qualified Pension Plan
 Other (please describe)

Please liquidate and transfer:

_____ The entire balance in the above listed account

_____ Specified amount you wish to transfer.

The funds will be deposited into my FCSLA Life policy # _____
Annuity Number

This policy has been established as:

IRA Roth IRA SEP

I understand that, if I am or will be at least 70 ½ years of age this year, I must take the minimum required distribution (MRD) on this account, whether it was taken by the current trustee or will be taken by FCSLA Life after transfer of funds.

I understand that any stocks and /or securities must be liquidated because FCSLA Life cannot accept non-liquid assets as a deposit to my annuity.

Proposed Annuitant/ Owner Signature

Date

Printed Name

Please note that a trustee-to-trustee transfer can only occur between accounts of the same tax qualification, e.g. IRA to IRA.