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IRA TRANSFER PURSUANT TO DIVORCE FOR ACCOUNT OWNER

The Millennium Trust IRA Account Owner should complete this form to authorize a transfer of interest from the IRA owner to his/her spouse under a divorce decree or separation instrument. Please print after completion. For assistance with this application, please contact a Client Service Specialist at 800.258.7878. (Hours: Monday - Friday, 8:00 am to 4:30 pm Central time.)

A Account Owner Information

Name:
 Millennium Account No.: Social Security No.:
 Daytime Phone No.: Date of Birth:
 Address:
 City: State: Zip:
 E-mail:

B Former Spouse Information

Name of Former Spouse:
 Social Security No.: Date of Birth:
 Address:
 City: State: Zip:
 E-mail: Daytime Phone No.:

C Requirements

Please provide the following information and documents.

- ▶ (a) Certified Copy of the final divorce decree or separation instrument with the judge's signature.
- (b) Marital property settlement agreement.
- (c) If the settlement is not current or not specific, please provide a letter of authorization and instructions signed and dated by both parties agreeing to specific asset division.

Note: Trustee-to-Trustee transfers of interest in an IRA from one spouse to another under a divorce decree or separation instrument are generally tax free and are not reported to the IRS.

Transfer Amount

I, the Account Owner herein authorize the transfer of \$ _____ or _____ %
 from my IRA to my spouse/ex-spouse pursuant to divorce.

Please continue to page two to complete this form.



D Asset Information

If funds are invested in assets other than cash (or cash equivalents), the timing of liquidation will vary depending on where the funds are invested. **MTC will request funds from liquidations be sent to MTC by check unless otherwise indicated in Section D2.** Once received, the check is held 5 business days to clear before the distribution can be issued.

If this box is not checked, Millennium Trust will request the liquidation.

1. List all assets to be liquidated or re-registered below. (Cash investments will be automatically liquidated.) **Note:** Attach a copy of your most recent asset statement to expedite the process.

In order to avoid duplicate liquidation requests by you and Millennium Trust; please check this box if you have personally requested a liquidation of your investments online or directly through your investment representative.

Liquidation or Re-Registration fees may apply.

Liquidate* or Re-Register	Asset Name/Description	Dollar Amt/All or %
<input type="radio"/>		
<input type="radio"/>		

2. Select the method that funds should be sent to Millennium Trust from assets sold.

Check (Upon receipt of funds, a 5 business day hold is required before funds are disbursed.)

Wire Transfer (Additional fees may apply.)

MTC will request funds be sent by check unless otherwise indicated.

Millennium Trust Company, LLC is not responsible if the asset has its own required delivery method.

E Authorization & Certification

I authorize and direct Millennium Trust as IRA Custodian to transfer the IRA funds to my ex-spouse as listed above.

I certify that all of the information I have provided on this form is correct. I have consulted my tax advisor concerning the taxable effect of this transfer; and I certify that Millennium Trust has not provided me with tax, investment or legal advice. I indemnify Millennium Trust as Custodian for the IRA or Roth IRA, its agents, affiliates and employees from any and all liability arising from this transfer.

Please sign and date to authorize this distribution.

Account Owner's Signature: _____

Date: _____

F Signature Guarantee

A Signature Guarantee is required and must be received by mail.

[Signature Guarantee Stamp Here]

A Signature Guarantee may be obtained from an authorized officer at a brokerage firm, bank or other financial institution. Certification by a notary public is not a substitute for a Signature Guarantee.