



30-50 Whitestone Expressway
 Ste. A301, Flushing, NY 11354
 Client Services: (800) 869-8800
 From Overseas: (718) 961-6600

IRA Journal Request Form and Deposit Slip

*Requests to move funds out of an IRA account must use the IRA Distribution Form

*This form should be used for funds coming into the Retirement Account

Date: _____

Delivering Account Number _____

Delivering Account Name/Title _____

Receiving Account Number _____

Receiving Account Name/Title _____

If the Receiving Account Title does not match the Delivering Account Title, the request will be considered a Third Party Transfer. Third Party Transfers must adhere to Apex's Third Party Policy.

Full Transfer of Cash and Securities? Y/N

(Accrued Interest will also be transferred)

For Partial Transfers, complete the following: Cash (\$)

Symbol/ CUSIP	Shares

Reason for Transfer:
(Please Check One Box Below)

Regular Contribution	Contribution for Tax Year _____ (If left blank will be deposited for current year. Prior year contributions can only be made until April 15 th of each year.)
Employer Contribution	Contribution for Tax Year _____ (If left blank will be deposited for current year.) Note: All SEP contributions are reported the year of deposit.
Employee Contribution	Contribution for Tax Year ____ (If left blank will be deposited for current year.)
Transfer	Transferred from an identical account type and or title.
Rollover	Qualifying Direct Rollover from my Employer's Plan ex. 401(k), 403(b), Profit Sharing Plan, Money

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