

# FIRST CATHOLIC SLOVAK UNION

## AUTHORIZATION TO TRANSFER AN INDIVIDUAL RETIREMENT ACCOUNT

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Present Trustee)

\_\_\_\_\_  
(Address)

Please select the type of IRA being transferred  Roth IRA  Traditional IRA

Gentlemen:

You are the trustee for my IRA Annuity, account number \_\_\_\_\_. Please be advised that I have applied for an IRA Annuity with the **First Catholic Slovak Union**. You are hereby requested to surrender the above IRA account and transfer proceeds by check as a tax-free exchange.

It is my intention that this payment shall not constitute actual or constructive receipt to me for income tax purposes. I request that you direct payment in my behalf by check drawn to and forwarded to: **First Catholic Slovak Union, FCSU Corporate Center, 6611 Rockside Road, Independence OH 44131-2398; attn: Ken Arendt**. I request that my name not appear as a joint payee on the check nor shall my endorsement thereon be necessary for transfer or deposit.

For purpose of this transfer, First Catholic Slovak Union is authorized to endorse, on my behalf, any checks or negotiable instruments received by them for my benefit in purchasing the IRA Annuity.

Very truly yours,

\_\_\_\_\_  
(Individual Signature)

\_\_\_\_\_  
(Date)

TO BE COMPLETED BY FIRST CATHOLIC SLOVAK UNION  
First Catholic Slovak Union Authorized Acceptance

Gentlemen:

This is to advise you that First Catholic Slovak Union will accept the check as stated above and will transfer it to a  Traditional IRA /  Roth IRA.

Please include the Annuitant's name on all documents sent to us.

All communication should be directed to the attention of the undersigned.

Very truly yours,



Ken Arendt, Executive Secretary  
First Catholic Slovak Union  
(216)642-9406