

Use this form to transfer funds directly from your existing IRA to your Advanta IRA.

1 Personal Information

Name <i>(Your name as it appears in your plan)</i> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____		Advanta IRA Account Number
Legal Address		City, State, Zip
Phone		Social Security Number

2 Current Custodian/Trustee *(please attach a copy of a current statement for this account)*

Name of Custodian/Trustee		Account Number*
Transfer Department Address		City, State, Zip
Contact Name <i>(optional)</i>	Phone Number	Type of Account <input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> SEP <input type="checkbox"/> SIMPLE <input type="checkbox"/> HSA <input type="checkbox"/> ESA <input type="checkbox"/> 401(k) <input type="checkbox"/> Beneficiary IRA

3 Transfer Details

<input type="checkbox"/> Option One: Cash Transfer <input type="checkbox"/> Complete - liquidate and send all proceeds <input type="checkbox"/> Partial - send ONLY \$ _____	<input type="checkbox"/> Option Two: In-Kind Transfer <i>(Advanta IRA will not accept in-kind transfers of publicly traded securities)</i> <input type="checkbox"/> Complete - send all assets listed below and cash <input type="checkbox"/> Partial - send ONLY the assets listed below
Asset Description	Amount

4 Transfer Instructions

- Please send cash from the custodian above via: Check *(subject to a 10-day hold)* Wire (\$15 fee)
- Please send this request to the custodian via: Mail 2nd day delivery (\$30 fee)

5 Signature and Acknowledgement

- I hereby agree to the terms and conditions set forth in this asset transfer form.
- I understand the rules and conditions applicable to an account transfer.
- I qualify for the account transfer of assets listed in section 3 above and authorize such transactions.

Your Signature: _____ Date: _____

Acceptance of Receiving Custodian

Pursuant to a limited written delegation Mainstar Trust, as custodian ("Custodian"), has authorized Advanta IRA to sign this form on the Custodian's behalf to verify the Custodian's acceptance of the transfer, rollover or direct rollover described above and agreement to apply the proceeds upon their receipt, to the account established by Advanta IRA on your behalf. Mainstar Trust assumes no trust or fiduciary obligations to you as it has no investment control over your funds and acts only as a custodian of your account.

Advanta IRA on behalf of Custodian, Mainstar Trust

By: _____ Date: _____ Account #: _____

Type of Account: Traditional Roth SEP SIMPLE HSA ESA 401(k) Beneficiary IRA