

The term IRA will be used below to mean Traditional IRA and SIMPLE IRA, unless otherwise specified.

VIP Services: (888) 855-9856 | info@trustprovident.com  
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### Section 1 Roth IRA Owner Information

First Name	MI	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Last Four Digits of Social Security Number	Roth Account Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section 2 Roth IRA Conversion Requirements *(To be an eligible conversion, all statements must be true.)*

This conversion contribution does not contain a required minimum distribution.

**If the assets are not payable directly to your Roth IRA, the following statement also must be true.**

I received the assets within the last 60 days.

**If this is a conversion of assets from a SIMPLE IRA, the following statement also must be true.**

More than two years have passed since the first contribution to my SIMPLE IRA.

### Section 3 Conversion Amount

I hereby irrevocably designate this contribution in cash and/or property as a conversion contribution.

Assets to Convert		
Asset Description (i.e., Cash Balance, Property Address, Policy ID, etc.)	Cash Amount Converted	Fair Market Value of Asset Converted (if applicable)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Section 4 Roth IRA Owner Agreement and Authorization

I have read and understand the conversion rules and conditions on both pages of this form and certify that I have met the requirements for making a Roth IRA conversion. All information provided by me is true and correct and may be relied on by the Custodian. I assume full responsibility for this conversion transaction and will not hold the Custodian liable for any adverse consequences that may result.

**X** \_\_\_\_\_  
Roth IRA Owner Signature Date (mm/dd/yyyy)

**Congratulations! You are now able to submit your completed request.**

Before you submit this form please review all completed information prior to signing. When ready, mail, email, or fax this completed form to:

**Mail to:** Provident Trust Group  
P.O. Box 123  
Fort Washington, PA 19034

**Email to:** assets@trustprovident.com

**Fax to:** (702) 253-7565