

**Administrative IRA Consolidation - Routine
Client Income Distribution**

Client Account Information

Account Title: _____

State purpose of administrative, IRA to IRA consolidation:

Periodic rebalance of investment allocations for purpose of maintaining enough assets to provide for short term income. IRA Account # _____ to IRA Account # _____.

Periodic consolidation of funds / securities to or from IRA Account # _____ to IRA Account # _____ to replenish funds allocated to fulfill shorter term income needs.

Other (please explain)

Financial Advisor Signature: _____ Rep #: _____

Date:

Supervisor's Approval Signature: _____ Date: _____