



TRADITIONAL TO ROTH CONVERSION

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PARTICIPANT INFORMATION

Participant: _____ Traditional IRA Account Number: _____

SSN: _____ Birth Date: _____ Phone: _____

Address: _____ City: _____ State: _____ ZIP: _____

Part I. Conversion from an IRA or employer sponsored plan to a Roth IRA

CHECK ONLY ONE and fill in where applicable

Choose one of the following:

- New Conversion:** This is a conversion to a NEW Roth Conversion IRA. A Roth IRA application must be attached.
- Existing Roth IRA:** This is a conversion to an EXISTING Roth conversion IRA. Roth IRA Account Number: _____

Choose one of the following:

- Full Conversion:** Convert all assets held in the above account
- Partial Conversion:** Convert the assets indicated below

| Asset Description | Indicate Amount (do not use percentages) |
|-------------------|--|
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Part II. Withholding Election

Option 1. Withhold Federal income tax at the rate of _____ % (not less than 10%) plus an additional amount of \$ _____ from the amount withdrawn.

Option 2. Effective _____, I elect not to have Federal income tax withheld. (Must have US residence address on file)

I understand that I am still liable for the payment of Federal income tax on the taxable amount. I also understand that I may be subject to tax penalties under the estimated tax payment rules, if my payments of estimated tax and withholding, if any, are not adequate.

Part II. Signature of the Roth IRA Participant

The undersigned hereby irrevocably elects, pursuant to IRS Regulation 1.402(a)(5)-1T to treat this contribution as a rollover contribution. I acknowledge that, due to the complexities involved in the tax treatment of roll overs between plans, conversions from plans, and roll overs from a Designated Roth Account under an employer's plan, the Trustee/Custodian has recommended that I consult with my tax advisor or the IRS before completing this transaction to make certain that this transaction qualifies as a valid contribution and is appropriate in my individual circumstances. I understand that these transactions are reported to the IRS and I acknowledge that I am responsible for record keeping Roth IRA contribution information as directed by the IRS. I hereby release the Custodian from any claim for damages on account of the failure of this transaction to qualify as a valid rollover contribution or conversion.

Signature of Participant _____ Date _____