

## 1 Account Information

NAME (as it appears on your account application)	ENTRUST ROTH IRA ACCOUNT NUMBER
DAYTIME PHONE NUMBER	EMAIL

## 2 Recharacterization Information

**Recharacterizing to one of the following:**

<input type="checkbox"/> NEW  <input type="checkbox"/> TRADITIONAL <input type="checkbox"/> SEP <input type="checkbox"/> SIMPLE  A new account application must be completed and attached.	<input type="checkbox"/> EXISTING ENTRUST ACCOUNT: <input type="checkbox"/> TRADITIONAL    Account number: _____ <input type="checkbox"/> SEP    Account number: _____ <input type="checkbox"/> SIMPLE    Account number: _____
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**Choose one of the following:**

<input type="checkbox"/> FULL RECHARACTERIZATION Recharacterize all assets held in the above account	<input type="checkbox"/> PARTIAL RECHARTERIZATION Recharacterize the assets indicated below
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Asset Description	Indicate Dollar Amount (do not use percentages)
	\$
	\$
	\$
	\$

## 3 Certification and Acknowledgement

1. I certify that the information provided is true and correct to the best of my knowledge.
2. I certify that no tax advice has been given to me by the Administrator or Custodian.
3. I hereby irrevocable elect, to treat this transaction as permitted under the IRS Regulations.
4. It is recommended that I consult with my tax advisor before completing this transaction.
5. I acknowledge that the transaction will be reported to the IRS.
6. I acknowledge that it will be reported in the calendar year it is completed.
7. I expressly assume the responsibility for any adverse consequences which may arise from this re-characterization request and I agree that the Administrator and/or Custodian shall in no way be responsible for those consequences.
8. I hereby release the Administrator and/or Custodian from any claim for damages on account of the failure of this transaction to qualify for recharacterization.

**Please read the disclosure above the signature line before signing and dating.**

SIGNATURE:	DATE:
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