



1105 State Route 121 North, Suite B  
 P.O. Box 870 ■ Murray, KY 42071  
 Office: 270.226.1000 ■ Fax: 270.226.1001  
 TF: 888.753.6972 ■ KingdomTrust.com

# Conversion Instructions

## For Traditional IRA to Roth IRA

**INSTRUCTIONS:** Please complete this form in its entirety. In addition, please be sure to read this entire form prior to completion to avoid any processing delays. By signing this form, you consent to all terms and conditions outlined in this document and reaffirm the terms and conditions in your Account Adoption Agreement.

### SECTION 1 - Account Holder Information

Name:  Social Security Number:

Traditional IRA Account Number:  Roth IRA Account Number:  Tax Year:

### SECTION 2 - Conversion Instructions

In order to complete the conversion, one of the following must be selected.

**Full Conversion**       **Partial Conversion**      Amount of Uninvested Cash to Be Converted: \$

Quantity	Asset to Be Converted	Price/Each	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### SECTION 3 - Tax Withholding Instructions

The IRS requires withholding of 10% of Traditional IRA funds being converted to a Roth IRA unless you instruct us otherwise. If you use IRA money to pay the taxes owed when you convert from the Traditional IRA to the Roth IRA, you may owe a federal early withdrawal penalty on the funds if you are not yet 59 ½ (because the IRA will treat this money as a withdrawal from your IRA), and you will also owe income taxes. To be eligible to opt out of this withholding, you must meet the following criteria:

1. you are a U.S. citizen or resident;
2. Kingdom Trust must have your Social Security Number; and
3. Kingdom Trust must never have been notified by the IRS that this Social Security Number is incorrect.

Please make your selection below. Please note that if neither election is made, Kingdom Trust must automatically withhold 10% of funds. Distributions (including this conversion) from your IRA are subject to federal (and possible state) income tax. If you elect to not have taxes withheld, you are nevertheless liable for payment of income tax and any applicable tax penalty and interest on the taxable portion of the distribution.

DO NOT WITHHOLD 10% or any other amount from the funds       WITHHOLD 10% of funds (state withholding may also apply)

### SECTION 4 - Signature

**I authorize and direct a conversion of my Traditional IRA to a Roth IRA as authorized above. By signing below, I acknowledge and understand that**

1. a rollover from a traditional IRA to a Roth IRA is treated as a taxable distribution and is subject to federal income tax withholding unless I have specifically requested above that federal income taxes not be withheld and I am eligible to opt out of withholding;
2. state tax withholding rules may also apply; and
3. the distribution is not eligible for capital gains treatment or income averaging.

Under penalties of perjury, I further certify that the taxpayer identification number shown below is my correct Social Security Number.

Account Holder Signature:   Date:

Account Holder Printed Name:  Social Security Number:

*Kingdom Trust does not provide tax, legal or investment advice. It does not endorse or recommend any agent, company or specific investment. Any information communicated by Kingdom Trust is solely for educational purposes and should not be construed as tax, legal or investment advice. Consultations with tax, legal and investment professionals is advised prior to making any decisions regarding your account.*

