

IBC Trust Service

A division of International Bank of Chicago
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Traditional IRA to Roth IRA Conversion Application

Note: Use this form to convert your current IRA to a Roth IRA. **For partial conversion**, you must submit this form with a completed IRA application. **For a complete conversion**, submit this form only.

Name of Administrator: IBC TRUST SERVICE

The name of the company that performs record keeping and administration of your plan on behalf of custodian named in IRS form 5305.

Section 1 – ACCOUNT HOLDER INFORMATION

Client Name	Social Security Number	Existing IRA Account Number
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Section 2 – CONVERSION INFORMATION

Choose one of the following:

- New Conversion:** This is a conversion to a NEW Roth conversion IRA. An IRA Application must be attached.
- Existing Roth IRA:** This is a conversion to an EXISTING Roth Conversion IRA.

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)

Section 3 – DECLARATION AND SIGNATURE

I understand that by converting my traditional IRA to a Roth IRA, I will owe income tax on all pre-tax assets converted. The decision of whether to convert my traditional IRA to a Roth IRA was made in light of all relevant financial information and in conjunction with my professional tax advisors.

Client Signature _____ Date _____

If you are over age 70 ½, you must take your required minimum distribution from your traditional IRA before converting to a Roth IRA.