

Account (Non-Qualified) Transfer Form



Insufficient information or incorrect forms will result in delays in processing your instructions. If you need assistance in completing this form or need additional forms, please contact our office at (719) 955-4801.

Name _____
 Date of Birth _____ SSN or TIN _____ Driver's License # _____ State _____
 Contact Phone _____ Email Address _____
 Street Address _____
 City _____ State _____ Zip _____

To avoid delays please check with your current Custodian for their correct address, required documentation, liquidation requirements (if applicable) and to find out if they require a signature guarantee. Attach a copy of the current account statement

Company Name _____
 Address _____
 City _____ State _____ Zip _____
 Phone _____ Fax _____
 Transferor Account # _____

PAYMENT INSTRUCTIONS

BY FED-WIRE

Integrity Bank & Trust ABA: #107006994
 1275 Village Ridge Pt Monument, CO 80132
 Account: #1057499
 Account Name: Integrity Trust Company

F/B/O Account # _____

Your Name _____

BY CHECK

Payable to Integrity Trust Company F/B/O

Your name _____

Account # _____

Mail or Overnight to:

Integrity Trust Company
 13540 Meadowgrass Dr., Ste 100
 Colorado Springs, CO 80921

TRANSFER INSTRUCTIONS

Account # or Investment	QUANTITY	INSTRUCTIONS
	Full Partial \$ _____ or shares _____	<input type="checkbox"/> Transfer in Kind <input type="checkbox"/> Liquidation
	Full Partial \$ _____ or shares _____	<input type="checkbox"/> Transfer in Kind <input checked="" type="checkbox"/> Liquidation
	Full Partial \$ _____ or shares _____	Transfer in Kind Liquidation

ACCOUNT HOLDER(S) AUTHORIZATION

Account Holder Signature _____ Date _____

Joint Account Holder Signature (if applicable) _____ Date _____

Officer Signature _____ Date _____

MEDALLION GUARANTEE

Complete only if required by existing Custodian.

The Medallion Signature Guarantee may be executed by Banks, Broker Dealers, Credit Unions, National Securities Exchanges and Savings Associations which participate in STAMP, SEMP or NYSE-MSP. A Notary Public is not a substitute for a Signature Guarantee. The Medallion Signature Guarantee stamp must include the words "Signature Guaranteed, Medallion Guaranteed" and otherwise comply with the medallion program requirements. Please check with the custodian to see if a Medallion Signature Guarantee is required.

Name and Title of Officer (print) _____

Officer Signature _____ Date _____

Medallion Signature Guarantee Stamp