

Internal Transfer Form

The Ameritrade Advisor Services (AAS) Internal Transfer Form is used to transfer funds/securities from an existing AAS account to another AAS account. If you wish to transfer funds or securities from another brokerage firm, please use the Account Transfer Form.
 Note: Trading on an account will slow the transfer process down.

1 Account Information

Delivering Account Number	Delivering Account Name(s)/Title
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(Note: In order to transfer **from** an IRA, you will need to complete an IRA Distribution Form.)

Receiving Account Number	Receiving Account Name(s)/Title
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(Note: Please complete section 3 if transferring **into** an IRA)

2 Assets to Transfer

- Total Transfer of All Securities and All Cash or Debit Balances**
 - I would like to keep the delivering account open after the transfer occurs.
- Partial Transfer**
 - Cash** (specify amount) \$ _____
 - Securities** (as described below)

Asset Description and/or Stock Symbol	Number of Whole Shares
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3 IRA Deposit Slip

If the Receiving Account is an IRA, please indicate the type of movement:

- Regular Contribution** (Note: If no tax year is indicated, the contribution will be reported as a current year contribution).
 Per IRS regulations, securities cannot be used to satisfy personal or employer contributions.
- Direct Transfer from another IRA**
- Rollover***

Tax Year of this IRA contribution

*If this transfer is being used to make a rollover contribution to your IRA, please attach a completed IRA Deposit Slip. To obtain an IRA Deposit slip, please contact your financial advisor.

4 Signature(s)

If either account is a joint account, all account owners must sign. If a debit balance is being transferred, the receiving account owner(s) must sign this form to accept the debit. If a UGMA/UTMA is being transferred to an individual, joint, or other type of account, I hereby certify that I have attained the age of termination for the state in which the UGMA or UTMA was established, the custodianship has therefore terminated, and that I have a present and absolute interest in and to all assets of such account.

<input checked="" type="checkbox"/> Account Owner's Signature	Date
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<input checked="" type="checkbox"/> Account Co-Owner's Signature	Date
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For debit balance acceptance only:

<input checked="" type="checkbox"/> Account Owner's Signature	Date
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<input checked="" type="checkbox"/> Account Co-Owner's Signature	Date
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