PROVIDENT TRUST GROUP
an ASCENSUS company

Roth IRA Conversion Certification

The term IRA will be used below to mean Traditional IRA and SIMPLE IRA, unless otherwise specified.

VIP Services: (888) 855-9856 | info@trustprovident.com
8880 W. Sunset Rd., Suite 250, Las Vegas, NV 89148

PRINT

Section 1 Roth IRA Owner Information

First Name | MI | Last Name

Email | Last Four Digits of Social Security Number | Roth Account Number

Section 2 Roth IRA Conversion Requirements *(To be an eligible conversion, all statements must be true.)*

☐ This conversion contribution does not contain a required minimum distribution.

If the assets are not payable directly to your Roth IRA, the following statement also must be true.

☐ I received the assets within the last 60 days.

If this is a conversion of assets from a SIMPLE IRA, the following statement also must be true.

☐ More than two years have passed since the first contribution to my SIMPLE IRA.

Section 3 Conversion Amount

I hereby irrevocably designate this contribution in cash and/or property as a conversion contribution.

Assets to Convert

Asset Description *(i.e., Cash Balance, Property Address, Policy ID, etc.)*	Cash Amount Converted	Fair Market Value of Asset Converted *(if applicable)*

Section 4 Roth IRA Owner Agreement and Authorization

I have read and understand the conversion rules and conditions on both pages of this form and certify that I have met the requirements for making a Roth IRA conversion. All information provided by me is true and correct and may be relied on by the Custodian. I assume full responsibility for this conversion transaction and will not hold the Custodian liable for any adverse consequences that may result.

X

Roth IRA Owner Signature | Roth IRA Owner Name *(Please type or print)* | Date

Congratulations! You are now able to submit your completed request.

Before you submit this form please review all completed information prior to signing. When ready, mail, email, or fax this completed form to:

Mail to: Provident Trust Group
8880 W. Sunset Rd., Suite 250
Las Vegas, NV 89148

Email to: assets@trustprovident.com

Fax to: (702) 253-7565

©2022 Ascensus, LLC