



INVESTMENT TRANSFER REQUEST

1. INVESTOR INFORMATION

Owner _____

Co-Owner (if applicable) _____

Phone: #1 _____ #2 _____ E-Mail _____

2. INVESTMENT TRANSFER ELECTION

One-Time Transfer*

Please make a One-Time Transfer from investment # _____ to investment # _____

of principal in the amount of \$ _____.

of interest in the amount of \$ _____.

of all interest available.

of full balance. I understand this will close the investment that funds are being transferred from.

Recurring Transfer*

Please set up a Recurring Transfer from investment # _____ to investment # _____

of principal in the amount of \$ _____.

of interest in the amount of \$ _____.

of all interest available.

Please make this transfer : Monthly by the 5th. OR Quarterly by the 5th.

3. ACKNOWLEDGMENT*

**If designated there is not enough interest available when transferring funds from a time certificate, a penalty may be applied. Any recurring transfer information entered here will nullify and replace any current recurring transfer that may be in place. Available interest is that interest which has been earned since the beginning date of the current term of a term investment, or since the opening date of a Demand investment.*

Print Name _____

Print Name _____

Signature _____

Signature _____

Date _____

Date _____

**Two signatures are required for those investments opened with a two signature requirement.*