

Rollover Cash

Rollover specialist: 877.464.0292

**1 OPEN** a ShareBuilder IRA and complete this form.

**2 CONTACT** your plan administrator for any paperwork they require.

**3 FAX** or mail all paperwork to us at the number or address below.  
 Include a copy of your most recent statement from your retirement account.



**FAX documents to:**  
 Our fax number  
 (available 24 hours per day)  
**888.389.1024**



**MAIL documents to:**  
**ING DIRECT Investing**  
 P.O. Box 4249  
 Seattle, WA 98194-0249

**"TO" (ShareBuilder account information)**

ShareBuilder Account Number: \_\_\_\_\_ (example: 1000-1234567890-01)  
 Account Owner: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

**"FROM" (other retirement account information)**

Account type:  401(k)  403(b)  457  Other Employer Plan  
 Account Owner: \_\_\_\_\_ Account Number: \_\_\_\_\_  
 Firm Name: \_\_\_\_\_ Firm Phone: \_\_\_\_\_  
 Firm Address: \_\_\_\_\_  
Street Address City, State, Zip

**Instructions to current trustee/Custodian**

Liquidate all assets and send check to ING DIRECT Investing.  
**Make check payable to ING DIRECT Investing, fbo** \_\_\_\_\_ (Please indicate the above account number on the check.)  
Customer name

**Authorization and signature**

We require a signature of the account owner in order to transfer your assets. Your signature indicates your understanding of and agreement to this transaction.  
 I authorize ING DIRECT Investing, Inc., to transfer the assets specified in the above form (and on the attached form if applicable), from the brokerage listed in the "FROM" section, to the ShareBuilder account listed in the "TO" section.

**X** \_\_\_\_\_  
SIGNATURE DATE

Signature guarantee or notary