



Qualified Domestic Relations Order Transfer Request Form

Use this form to execute a **Qualified Domestic Relations Order ("QDRO")** of a **Traditional, SEP, or Roth IRA**. If both the **IRA owner and the former spouse complete this form, only a photocopy of the QDRO is required**. If the owner does not sign this form, please submit a court certified copy of the QDRO.

- **To Participant:** Please complete sections I, II, and III of this form according to the provisions contained in your QDRO and sign to show your consent to the QDRO transfer.
- **To the Former Spouse/Alternative Payee:** Please complete sections IV and V.

MAILING INSTRUCTIONS

Please send completed form to:

Regular Mail Delivery

FPA Funds
PO Box 2175
Milwaukee WI 53201-2175

Overnight Delivery

FPA Funds
C/O UMB Fund Services, Inc
235 W Galena Street
Milwaukee WI 53212-3948

PART I: IRA OWNER INFORMATION

Name: _____ Taxpayer ID Number: _____ Date of Birth: _____

Residence Address: _____

Primary Phone: _____ Email Address: _____

Name of Former Spouse: _____

Type of account (select only **one**): Roth IRA Traditional IRA SEP IRA

PART II: QDRO DISTRIBUTION AMOUNT (AS DIRECTED IN QDRO)

Fund Name/Account Number _____ Amount \$ or Percentage % _____

Fund Name/Account Number _____ Amount \$ or Percentage % _____

PART III: IRA OWNER CONSENT

I consent to the above QDRO transfer from my Traditional, SEP, or Roth IRA to my former Spouse. (If the IRA owner does not sign below, a certified copy of the Qualified Domestic Relationship Order is required.)

Signature of IRA Owner:

X _____ Date: _____

A Medallion signature guarantee is required to execute the QDRO transfer without a certified copy of the QDRO, if proceeds are going to a payee, address or bank account other than those listed on your account, or if you are depositing your distribution into a new non-IRA account which is registered to a name other than your name only.

A Medallion signature guarantee may be obtained from a member of a national securities exchange, a U.S. commercial bank, trust company or federally chartered savings and loan or other eligible guarantor institution. **A notary public is not an acceptable guarantor.**

Medallion signature guarantee (if required)

PART IV: TRANSFER INSTRUCTIONS

Transfer the assets as follows:

My existing IRA account, account number: _____

A new IRA account-*see enclosed IRA Application.*

Transfer the assets to my existing account with another custodian. An IRA Transfer Form from the successor custodian is attached.

Note: A like IRA is required to process the transfer. Traditional and SEP IRA assets must transfer to a Traditional IRA.

PART V: FORMER SPOUSE/ALTERNATIVE SPOUSE SIGNATURE

I certify that the above information is true and correct. I authorize the transfer of assets as directed above.

Signature of Former Spouse/Alternative Payee:

X _____ Date: _____

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Medallion signature guarantee (if required)