

# IRA Rollover Certification Form

Use this form to certify an indirect/60-day rollover distribution from your current IRA, Roth IRA, or an eligible Qualified Retirement Plan distribution to your Goldman Sachs Custody Solutions IRA.

## Instructions

1. Complete the form below.
2. Sign and send us the completed form, along with the distribution check you received, within 60 calendar days of your receipt of that distribution.

### U.S. Mail

Goldman Sachs Custody Solutions  
ATTN: IRA Department  
2255 E Sunnyside Ave  
PO Box 58199  
Salt Lake City, UT 84108

### Priority Mail

Goldman Sachs Custody Solutions  
ATTN: IRA Department  
222 South Main St.  
Salt Lake City, Ut 84101

## Account Information

<b>Personal Information</b>	Name (Print name exactly as it appears on your IRA)		
	Date of Birth / /	Social Security Number (SSN) - -	Daytime Telephone Number ( ) -
<b>Deposit Information</b>	Goldman Sachs Custody Solutions Account Number	Account Type Traditional IRA Rollover      Roth IRA	
	Deposit Date (if this form is being submitted after a deposit has posted to the account).	Amount	

### Amount & Type of Rollover Contribution - Check one:

**Traditional IRA/Roth Rollover** – To be eligible, 365 days must have passed since the last time that you last received a rollover distribution from the IRA for which you are requesting a distribution.

**Qualified Plan Rollover Distribution** – An eligible distribution is generally a non-periodic distribution from a qualified retirement plan for all or part of your account balance which is rolled over into your Goldman Sachs Custody Solutions IRA within 60 days of receipt, except for any portion of a distribution which is nontaxable. Your employer should be able to tell you what portion of your distribution is an eligible distribution.

**Qualified Domestic Relations Order Distribution** (Attach such document)

**Qualified Plan Rollover Distribution from Roth 401k/403b** (Funds must go into a Roth Qualified Plan or Roth IRA)

### Age 73 or older Rollover Restrictions – for Traditional IRA only - Check one:

**I will not be 73 or older in this calendar year.**

**I am or will be 73 or older in this calendar year.** I understand that I may not rollover any amounts required to be distributed under Internal Revenue Code Sections 408(a)(6) and 401(a)(9) (Required Minimum Distribution).

### Certification

I certify that the contribution described above is an eligible Traditional/Roth IRA rollover contribution and that I am rolling over this contribution within 60 calendar days of my receipt of that distribution. I understand that this rollover is irrevocable and involves important tax considerations. Specifically, I understand that a rollover contribution from a qualified retirement plan will no longer be eligible for the special averaging, capital gains and separate tax treatment that may be available for distributions from such plans. Other tax considerations may also apply.

I agree that I am solely responsible for all tax consequences of this rollover contribution. I also agree that Goldman Sachs Custody Solutions shall not have any responsibility for any such tax consequences. I also understand that restrictions regarding subsequent rollovers may apply.

**I have read and understand and agree to these terms. I understand that GSCS will rely on this form when accepting my rollover distribution, that I am responsible for the movement of my rollover IRA to my successor IRA, and that GSCS has no duty to endorse the collection of any assets to be rolled over to my GSCS IRA.**

<b>IRA Account Owner</b>	X	/	/
<b>Authorized Signatory/POA</b> (only clients permitted onto the account)	Printed Name	/	/
	X	/	/