

1 Account Information

NAME (as it appears on your account application)	ENTRUST ROTH IRA ACCOUNT NUMBER
DAYTIME PHONE NUMBER	EMAIL

2 Recharacterization Information

Recharacterizing to one of the following:

<input type="checkbox"/> NEW <input type="checkbox"/> TRADITIONAL <input type="checkbox"/> SEP <input type="checkbox"/> SIMPLE A new account application must be completed and attached.	<input type="checkbox"/> EXISTING ENTRUST ACCOUNT: <input type="checkbox"/> TRADITIONAL Account number: _____ <input type="checkbox"/> SEP Account number: _____ <input type="checkbox"/> SIMPLE Account number: _____
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Choose one of the following:

<input type="checkbox"/> FULL RECHARACTERIZATION Recharacterize all assets held in the above account	<input type="checkbox"/> PARTIAL RECHARTERIZATION Recharacterize the assets indicated below
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Asset Description	Indicate Dollar Amount (do not use percentages)
	\$
	\$
	\$
	\$

3 Certification and Acknowledgement

1. I certify that the information provided is true and correct to the best of my knowledge.
2. I certify that no tax advice has been given to me by the Administrator or Custodian.
3. I hereby irrevocable elect, to treat this transaction as permitted under the IRS Regulations.
4. It is recommended that I consult with my tax advisor before completing this transaction.
5. I acknowledge that the transaction will be reported to the IRS.
6. I acknowledge that it will be reported in the calendar year it is completed.
7. I expressly assume the responsibility for any adverse consequences which may arise from this re-characterization request and I agree that the Administrator and/or Custodian shall in no way be responsible for those consequences.
8. I hereby release the Administrator and/or Custodian from any claim for damages on account of the failure of this transaction to qualify for recharacterization.

Please read the disclosure above the signature line before signing and dating.

SIGNATURE:	DATE:
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