

When to use this form:

Please use this form to convert an existing CamaPlan Traditional, SEP, Simple, 401(k), or Inherited/Beneficiary IRA account into a Roth account.

NOT for HSA, ESA, or Precious Metals accounts.

To complete your Roth IRA Conversion Directive:

1. COMPLETE ALL FIELDS IN SECTION 1

All information must match the information CamaPlan has on file for the participant.

2. IDENTIFY THE TYPE OF CAMAPLAN ACCOUNT YOU ARE CONVERTING

3. DETERMINE IF YOU ARE CONVERTING FUNDS TO AN EXISTING CAMAPLAN ROTH ACCOUNT OR NEED TO OPEN A NEW ROTH ACCOUNT

4. READ THE TERMS AND SIGN THE DIRECTIVE

5. SEND THE ORIGINAL SIGNED CONVERSION DIRECTIVE ALONG WITH A COMPLETED IRA DISTRIBUTION REQUEST FORM AND NEW ACCOUNT APPLICATION (IF THIS IS A NEW ACCOUNT) TO CAMAPLAN

CamaPlan Fax:
(973) 302-8622

Mail your Roth Conversion Directive to:

CamaPlan
122 E. Butler Ave, Suite 100
Ambler, PA 19002

What's next?

Within 48 hours of our receipt of your Roth Conversion Directive, the conversion will take place.

If you have any questions, please contact Operations.

Operations@CamaPlan.com
(866) 559-4430



ORIGINAL FORM REQUIRED - MUST BE ACCOMPANIED BY IRA DISTRIBUTION REQUEST FORM

IF THIS IS A NEW ACCOUNT, MUST BE ACCOMPANIED BY A NEW ACCOUNT AND ADOPTION AGREEMENT FORM

1. Participant Details

Participant Legal Name

Address

Street

City

State

ZIP

Soc. Sec. No.

Date of Birth

Phone

2. Current Account Details

CamaPlan Account Number (to be converted)

The account to be converted to a Roth IRA is CURRENTLY a

- Traditional IRA
- SEP IRA
- Simple IRA (Must have been open a minimum of (2) years)
- Employer-Sponsored Account (401(K) or qualified plan)
- I authorize CamaPlan to close this old account upon conversion.

3. Conversion Instructions

Choose a conversion destination.

- Create NEW Roth IRA Account (attach CamaPlan Roth IRA application)
- Convert to EXISTING Roth IRA Account
Account Number

Conversion Amount

- Full Conversion
(Convert all assets "in-kind" together with cash balance to Roth IRA account.)
- Partial Cash Conversion
Convert the following amount in CASH to the Roth IRA account. \$
- Partial Asset Conversion
Convert the ASSETS(S) specified below to Roth IRA account.

1. ASSET Description

Fair Market Value* \$

Interest to be converted \$/%

2. ASSET Description

Fair Market Value* \$

Interest to be converted \$/%

3. ASSET Description

Fair Market Value* \$

Interest to be converted \$/%

*Fair Market Value of an ASSET must be provided with supporting documentation.

4. Signature

I understand that any Roth Conversion is a taxable event.

I hereby certify, acknowledge and agree as follows:

- 1.) That I have been advised to seek the advice of independent legal and tax professionals prior to entering into this Roth Conversion Directive.
- 2.) That I have or will establish a Roth IRA with CAMA Self Directed IRA, LLC (Administrator) in order to accommodate the instant Roth Conversion.
- 3.) That I am responsible to determine whether I am eligible to initiate the instant Roth Conversion and that such Conversion qualifies as a valid rollover contribution to my Roth account.
- 4.) That I am responsible for obtaining a valid Fair Market Valuation of the asset(s) converted to my Roth account and provide such valuation to Administrator.

By signing below, I hereby waive any and all claims, causes of action and/or liability that may arise as against and hereby release and hold Administrator and Custodian harmless from any such claims, causes of action & liability that may arise as a result of entering into this Roth Conversion Directive upon the terms hereof.

Participant's Signature

Date