

**JOURNAL LETTER FOR JANNEY CUSTODIAL IRAs AND QUALIFIED PLANS
ACCOUNT OWNER'S INFORMATION:**

With respect to the account referenced please accept this as your authority to transfer the following money:

Name: _____ **From Account Number:** _____

To Account Number: _____ **Total amount to be transferred:** \$ _____

TYPE OF JANNEY RETIREMENT ACCOUNT FUNDS ARE BEING TRANSFERRED TO:

- Traditional IRA Roth IRA Sep IRA Simple IRA Education IRA Qualified Plan

Type of Contribution:

	<u>Current Year</u>	<u>Prior Year</u>
Traditional IRA – Deductible	\$ _____	\$ _____
Traditional IRA – Non-deductible	\$ _____	\$ _____
Roth IRA	\$ _____	\$ _____
Coverdell Education Savings Account	\$ _____	\$ _____
Employee Elective Deferral to SARSEP, SIMPLE & 401(k) Plan	\$ _____	\$ _____
Employer Contributions to SARSEP, SIMPLE, & 401(K) Plan (including "EZ-k")	\$ _____	\$ _____
SEP-IRA	\$ _____	\$ _____
Profit Sharing or Money Purchase Plan ("Janney Custodian" <u>only</u>)	\$ _____	\$ _____

Other Deposits:

Rollover from another IRA	\$ _____	Rollover from a Qualified Plan	\$ _____
Rollover from a 403(b) Plan	\$ _____	Rollover from a 457(b) Plan	\$ _____
Initial Fee	\$ _____	Annual Fee (prior to due date)	\$ _____

Undersigned acknowledges that upon Janney Montgomery Scott LLC's acceptance of this instruction, the undersigned will relinquish all right, title and interest in and to the said money being transferred and does hereby finally and irrevocably release and discharge Janney Montgomery Scott LLC of any and all claims by the undersigned or the undersigned's legal representatives with reference thereto including the proceeds of sale or other disposition.

Dated: _____ **Customer's Signature(s):** _____

Financial Consultant has witnessed the client/authorized parties signature. Financial Consultant has NOT witnessed the client/authorized parties signature, but has verified the signature(s) by review of current documents on file.

Financial Consultant Signature: _____

Branch Manager Signature: _____