

Funding & Asset Investment Instructions

IRA to IRA Transfer

- When completing transfer form, please ensure accurate and thorough information is placed on the transfer form. This will help speed along the process.
- NuView will initiate IRA transfer request on your behalf as soon as the account is opened. (We encourage you to follow up with your prior custodian after 2 business days. Industry standard turnaround time is 2-3 weeks. You can submit a Wire (\$30 fee) request if needed sooner. Incoming checks have a 5 day hold on funds.)
- For questions on Transfers please contact 407-367-3472 x 2100 or documents@nuviewira.com

How to initiate a DIRECT rollover

- Complete the rollover form that is attached to our IRA application for our records.
- Contact your previous custodian/plan administrator (401k) and let them know you would like to request a Direct Rollover to NuView (Self Directed IRA custodian).
- Fill out the documentation from the plan administrator who will ask how you want the check to be made payable. The Check needs to be made payable to: NuView Trust Co. Custodian FBO _(your full name)_ IRA.



- You can request the check to be sent directly to NuView at: 280 S. Ronald Reagan Blvd Longwood, FL 32750.
 - Often times they have to mail the check directly to the client and you will forward it to us at NuView. Rarely it can be initiated as a wire transfer. \$30 fee (funds are available quicker).

How to initiate an INDIRECT rollover: (not common- usually done under special circumstances)

- Complete the rollover form that is attached to our IRA application for our records.
- Contact your previous custodian/plan administrator (401k) and let them know you would like to request a distribution without the tax being withheld.
- You are only allowed ONE indirect rollover per 12 months.
- You must deposit the distribution into a qualified retirement plan within 60 calendar days of requesting the distribution. (**Always discuss with your tax professional - If not done correctly it can cause a TAXABLE event.**)