

NFCU TRANSFER REQUEST FORM.

Submit to Cert & IRA via the Sharepoint Intake Form at:

https://sharepoint.nfcu.net/org/savings-membership/cib/Lists/IntakeForm/NewForm.aspx?RootFolder=

For transferring funds from NFCU Certificate & IRA to an account through Navy Federal Financial Group. For third party transfer requests the fax number should still be used: **703-206-4250**

Click the link above or search "NFFG Intake" on Sharepoint to access the **Intake Form**. Select the Group Name **NFFG**. Click **Add Attachment** (to include this coversheet and the transfer paperwork).

Member Name

Representative Name

Transferring from:	
Account Type: ☐ IRA* ☐ CD	
Account Number:	
*IRA transfers and rollovers MUST have signed IRA Transfer/Rollover paperwork from the receiving institution attached this request form (N/A for Pershing accounts and Quasar). If the funds are being withdrawn from a certificate account no additional paperwork will accompany this form.	
☐ Full transfer ☐ Partial transfer: Specify amount \$ Transferring to:	☐ Liquidate immediately and transfer cash ☐ Liquidate at maturity and transfer cash: Specify maturity date
Make check payable to:	
Pershing LLC Specify Compa	any (Direct Business):
Reference Account Number:	
If IRA, please indicate: Transfer Contribution (Year):	
Mail check to:	
Pershing LLC 10150 Meanley Drive, 1st Floor San Diego, CA 92131 (Direct Business):	DriveWealth, LLC Attn: Operations / IRAs 15 Exchange Place 10th Floor Jersey City, NJ 07302
PLEASE NOTE: If the receiving account has not been established yet, please wait until the accountis opened and there is an account number before submitting this transfer request for processing.	
Member Signature:	Date Signed
Representative Signature:	Date Signed: