

# Recharacterization Re-designation of Contribution

Complete this form to make an irrevocable election to recharacterize all or a portion of a contribution.  
Note: A recharacterization is a tax-reportable event. See IRS form 8606 and its instructions, or contact a tax advisor for tax reporting questions.

## ACCOUNT HOLDER INFORMATION

Name:	Account Number:
Social Security Number:	Date of Birth:
Legal Address:	City, State, Zip Code:

## RECHARACTERIZATION OF CONTRIBUTION

Amount of original contribution: \_\_\_\_\_ Date of original contribution (mm/dd/yyyy): \_\_\_\_\_

Select one:

- Recharacterizing (re-designating) a Traditional/SEP contribution as a Roth contribution.
- Recharacterizing (re-designating) a Roth Contribution as a Traditional IRA contribution.

Transfer the recharacterized amount of \$ \_\_\_\_\_ or percentage \_\_\_\_\_ % to my account number: \_\_\_\_\_

- Traditional IRA
- Roth IRA
- SEP IRA
- SIMPLE IRA

## ACCOUNT HOLDER SIGNATURE

I certify that all of the information I have provided is correct. I understand that transactions from this account are reported to the IRS. I further certify that Quest Trust Company (QTC) has given no tax advice to me and that all decisions regarding this recharacterization are my own. I expressly assume the full responsibility of determining that this transaction qualifies as a recharacterization under Internal Revenue Service (IRS) regulations. I agree that QTC shall in no way be responsible for those consequences.

Signature of Account Holder: \_\_\_\_\_ Date: \_\_\_\_\_