



Rollover Review and Statement of Rollover Eligibility

Questions? Call us at 1-888-502-2967

Return completed forms as follows:

Mail: Axos Bank
ATTN: Retirement Services
PO Box 911039
San Diego, CA 92191-1039
Fax: 858-649-2969
E-mail: RetirementServicesSupport@axosbank.com

IRA Owner Information

Name	
Account Number	
Date of Birth	Social Security Number

Rollover Review and Statement of Rollover Eligibility

I attest that the following is true regarding my rollover of IRA/Roth funds:

The funds being rolled over were received within the last 60 days

I have not completed another rollover from any IRA/Roth that I own within the last 12 months

If I do have a mandatory distribution requirement, I have fulfilled it prior to this rollover

For Direct or Indirect Rollovers from an Employer Sponsored Retirement Plan, I attest that the following is true:

This rollover contribution is from an eligible employer sponsored retirement plan

This rollover does not contain any ineligible rollover distributions

If the funds are not made payable to Axos Bank™ for the benefit of my IRA/Roth, I received these funds within the last 60 days

If the funds are being rolled over to a Roth IRA, I understand that I am solely responsible for knowing all tax consequences of this action

Signature

By signing below I am confirming that I understand all rollover eligibility rules and that this rollover to my IRA/Roth at Axos Bank meets all rollover eligibility requirements. I have received no guidance or advice from Axos Bank or any of its agents and am taking this action of my own determination. I understand that I am solely responsible for any tax consequences incurred as the result of completing this rollover.

Signature of IRA Owner

Date