



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 If the funds are being withdrawn from a certificate account no additional paperwork will accompany this form.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 \$

☐ Liquidate immediately and transfer cash

☐ Liquidate at maturity and transfer cash:
Specify maturity date

Transferring to:

Make check payable to:

☐ Pershing LLC

☐ DriveWealth, LLC

☐ Specify Company (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

☐ DriveWealth, LLC

Attn: Operations / IRAs
15 Exchange Place 10th Floor
Jersey City, NJ 07302

☐ (Direct Business):

PLEASE NOTE: If the receiving account has not been established yet, please wait until the account is opened and there is an account number before submitting this transfer request for processing.

Member Signature: _____

Date Signed _____

Representative Signature: _____

Date Signed: _____