



Retirement Accounts

SPOUSE BENEFICIARY REQUEST TO ASSUME OWNERSHIP OF IRA

1 IRA's Trustee or Custodian

Current Custodian / Financial Institution

+ ATTACH a copy of your recent account statement from your present Custodian.

Constellation Trust Company

NAME OF FINANCIAL INSTITUTION (Trustee, Custodian or Employer)

Post Office Box 46407

ADDRESS

ACCOUNT NUMBER

Cincinnati

CITY,

PHONE NUMBER

OH 45246-0707

STATE

ZIP

2 Inherited IRA Information

Type of IRA

☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE

IRA ACCOUNT/PLAN NUMBER

3 Deceased IRA Owner Information

Account Being Inherited

This form may be used by the spouse beneficiary of a deceased IRA owner who died after December 31, 2019, to request the transfer of an Inherited IRA to the spouse's own IRA.

NAME OF DECEASED IRA OWNER

ACCOUNT NUMBER

TAXPAYER ID NUMBER or SSN

DATE OF BIRTH

DATE OF DEATH

4 Inherited IRA Information

Inherited Owner Information

i FOR ASSISTANCE with this form, call Shareholder Services at (800) 662-0201, or the Timothy Plan at (800) 846-7526.

+ NEW ACCOUNTS: Complete and attach the Traditional/SEP IRA New Account Form.

NAME (First, Initial, Last)

GENDER: ☐ Male ☐ Female

DATE OF BIRTH

RESIDENCE ADDRESS

CITY,

STATE

ZIP

MAILING ADDRESS

CITY,

STATE

ZIP

DAYTIME PHONE NUMBER

TAXPAYER ID NUMBER or SSN

TIMOTHY PLAN ACCOUNT NUMBER (if any)

5 Eligibility

Reasons for Transfer

COMPLETE THIS SECTION ONLY FOR RETIREMENT PLANS.

Answer the questions below to determine your eligibility for transferring the Inherited IRA to your own IRA.

1. Did the IRA owner pass away prior to last year?

☐ YES ☐ NO

If "NO", go to Section 6. If "YES", go to Question #2.

2. Will you attain age 74 or older by the end of this calendar year?

☐ YES ☐ NO

If "NO", go to Section 6. If "YES", you are **NOT** eligible to transfer the Inherited to your own IRA as the deadline to do so has passed. You may, however, be eligible to move all or a portion of the Inherited IRA funds to your own IRA via a distribution from the Inherited IRA and a rollover contribution into your own IRA. Before you roll over the Inherited IRA to your own IRA, you must satisfy required distributions including, but not limited to "hypothetical required minimum distributions" from all applicable IRAs. Required distributions rolled over may result in an excess contribution subject to IRS penalty and additional tax.



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Transfer Instructions

Inherited IRA Transfer

 **FOR ASSISTANCE** with this form, call Shareholder Services at **(800) 662-0201**, or Timothy Plan at **(800) 846-7526**.

COMPLETE AS NAME(S) APPEAR ON ACCOUNT STATEMENT.

TO REQUEST THE INHERITED IRA BE TRANSFERRED TO YOUR OWN IRA, PLEASE CHECK THE BOX, AND INDICATE THE RECEIVING IRA TYPE AND IRA/PLAN NUMBER BELOW:

☐ I elect to transfer the Inherited IRA to my own IRA. I understand that if there is a required distribution associated with the inherited IRA assets for the current year and the required distribution was not satisfied prior to the transfer of the Inherited IRA assets into my own IRA, it is my responsibility to withdraw such required distribution before the end of the calendar year.

IRA Type (receiving IRA): ☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE


Amount: \$ _____

Receiving IRA/Plan Number: _____



Acknowledgment

Your Signature

 **WARNING.** This application will not be processed unless signed by the Account Owner.

By signing this Spouse Beneficiary Request to Assume Ownership of IRA form, I certify that the information I have provided is true and correct. I authorize the IRA Trustee/Custodian to transfer the Inherited IRA to my own IRA as instructed above. I understand that I am responsible for ensuring I am eligible to authorize this transfer and I assume all responsibilities for any consequences that arise resulting from my actions. I agree to indemnify and hold the IRA Trustee/Custodian harmless from any consequences related to executing my directions. I have been advised to seek competent legal and tax advice and have not been provided any such advice from the IRA Trustee/Custodian

SIGNATURE OF SPOUSE BENEFICIARY

DATE

SIGNATURE OF IRA TRUSTEE/CUSTODIAN

DATE



Mailing Your Application

Return Completed Form

USE YOUR PREFERRED MAILING METHOD.

REGULAR DELIVERY:

Timothy Plan
c/o Ultimus Fund Solutions, LLC
PO Box 46707, Cincinnati, OH 45246-0707

OVERNIGHT DELIVERY:

Timothy Plan
c/o Ultimus Fund Solutions, LLC
225 Pictoria Dr, Ste 450, Cincinnati, OH 45246

Phone | (800) 662-0201
Local | (402) 493-4603
Fax | (402) 963-9094