

Roth In-Plan Conversion Form

This form is used to convert non-Roth assets within your account to Roth.

Name: _____ SS#: _____

____ Option A: Full conversion to Roth.

____ Option B: Specific conversion to Roth.

Indicate specific amount or source for conversion:

\$ or % _____ Source(s): _____

\$ or % _____ Source(s): _____

\$ or % _____ Source(s): _____

Additional instructions _____

Participant: _____ Date: _____

(signature)