



NFCU Transfer Request Form

For transferring funds from NFCU Certificate & IRA to an account with NFFG.

Third Party transfer requests should be faxed to: 703-206-4250

Submit via SharePoint Intake Form: <https://sharepoint.nfcu.net/org/savings-membership/cib/IntakeForms/Home.aspx>

External to CIT Request - "Submit a new intake request"- Select Group Name "NFFG"

Click "Add Attachment" (to include this coversheet and transfer paperwork)

Member Name

Representative Name

Transferring from:

Account Type:
 IRA* CD

Account Number:

IRA transfers & rollovers **MUST** have signed IRA Transfer/Rollover paperwork from the receiving institution attached to this request.
(N/A for Pershing & Digital Investor accounts)

- 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

Drive Wealth LLC

Direct Business:

**Attn: Operations/IRA
28 Liberty Street 50th Floor
New York, NY 10005**

****Please wait until the receiving account is opened with account number prior to submitting this transfer request for processing****

Member Signature

Date Signed:

Representative Signature _____

Date Signed: