



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

One Pershing Plaza
Jersey City, NJ 07399

☐ Drive Wealth LLC

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

☐ Direct Business:

****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: