

Letter of Authorization -Internal Transfer

This form is used to transfer funds/securities internally from one brokerage account to another brokerage account at the same introducing broker dealer. This form is not intended for and will not be honored to make withdrawals from IRA accounts.

STEP 1: ACCOUNT INFORMATION			
Delivering (From) Account Number		ing (To) Account Number	ACCOUNT ACTIVITY, SUCH AS RECENT DEPOSITS OR TRADING ACTIVITY, MAY DELAY THE TRANSFER PROCESS.
Account Title (cont'd.)		nt Title (cont'd.)	FOR ALL GIFT TRANSFERS, THE DATE OF GIFT IS THE DATE THE TRANSFER IS PROCESSED.
Total Transfer (All cash and securities) ☐ I am requesting to have the delivering account closed after the internal transfer occurs. ☐ Partial Transfer ☐ One time only (Default) ☐ Standing Instructions ☐ Cash — ☐ All ☐ IRA Contributions Only ☐ Specify Amount \$ ☐ Current Year ☐ Prior Year ☐ Securities — as described below, attach a separate signed spreadsheet if more space is needed Number of Shares ☐ Description/Symbol			TOTAL TRANSFERS DO NOT NEED TO LIST THE SECURITIES BELOW. ALL CASH, SECURITIES AND OR DEBIT BALANCES WILL BE MOVED. PARTIAL TRANSFERS MUST SPECIFY SECURITIES AND/OR CASH OR DEBIT BALANCE. STANDING INSTRUCTIONS ARE VALID FOR ONE YEAR FROM SIGNATURE DATE BELOW. NOT AVAILABLE FOR IRA ACCOUNTS.
			CONTRIBUTIONS TO AN IRA ACCOUNT MUST BE MADE IN CASH.
Signatures – All account Holders Must sign Below By affixing my signature below, I represent to COR Clearing LLC and my brokerage firm that the information contained above is truthful and accurate, and represents my instruction. Delivering Account Holder Signature Print Name Date			-ALL REGISTERED OWNERS ON YOUR BROKERAGE ACCOUNT ARE REQUIRED TO SIGN THE SAME FORMFOR BUSINESS AND TRUST ACCOUNTS, SEPARATE SUPPORTING DOCUMENTATION CONFIRMING THE SIGNATURE AUTHORITY
Delivering Account Holder Signature ** ** ** ** ** ** ** ** **	Print Name	Date	FOR THE BROKERAGE ACCOUNT IS REQUIRED. - IF A DEBIT BALANCE IS BEING TRANSFERRED THE RECEIVING ACCOUNT OWNER(S) MUST
Receiving Account Holder Signature Receiving Account Holder Signature	Print Name Print Name	Date Date	ALSO SIGNCONTRIBUTIONS MADE TO AN IRA OR ROTH IRA MUST BE SIGNED BY THE IRA OR ROTH
×			IRA ACCOUNT HOLDER. - ALL REQUESTS INVOLVING AN IRA ACCOUNT MUST BE SUBMITTED TO THE IRA
SIGNATURE – GENERAL PRINCIPAL SIGNA General Principal x	TURE Print Name	Date	DEPARTMENT FOR PROCESSING. ALL OTHER REQUESTS GO TO MARGINS.