

IRA Recharaterization



Please FAX, MAIL or EMAIL to:
(Send only ONE way to avoid duplicate payments)

MidAtlantic IRA, LLC
118 West Church Street
Frederick, Maryland 21701
240/575.3880 office
www.MidAtlanticIRA.com

Account Holder

Name: _____

Account Number: _____

Please choose one of the below reasons to certify your reason for recharaterization.
Recharaterizations can only be done for conversions/contributions made in the previous or current tax year.

- I have already converted a Traditional IRA to a Roth IRA and wish to transfer all or part of the balance back to a Traditional IRA*
- I wish to reclassify my Roth IRA contribution to a Traditional IRA contribution*
- I wish to reclassify my Traditional IRA contribution to a Roth IRA contribution*

ACCOUNT HOLDER SIGNATURE _____

DATE _____

FOR OFFICE USE ONLY *Signature Verified*

by _____ on ____/____/____