IRA Change Investment Form
For Existing Citibank IRA Customers

Please use this form to select a new Traditional IRA, Roth IRA, or SEP-IRA investment option for funds currently in your Traditional IRA, Roth IRA, SEP-IRA, or Citibank Rollover IRA.

Please review the information below before you complete this form.

Important things to remember:

- When making your investment selection, please refer to your Citibank Traditional IRA, Citibank Roth IRA, or Citibank SEP-IRA Plan Documents for information and general rules.
- If you prefer, investment changes may be made by telephone. Our telephone numbers are listed below.
- A CD will renew into the same term investment (unless otherwise indicated) at the rate in effect on the date of maturity. If you select a new investment option, you will receive a confirmation letter from us confirming this change.[1]
- If you would like to add to Traditional IRA, Roth IRA, or SEP-IRA at the same time your CD matures, please attach your check made payable to Citibank, N.A. as custodian and complete Section C.
- If you are reinvesting a maturing Traditional IRA/Roth IRA/SEP-IRA CD into a new investment option, please indicate the date your CD matures.
- Complete a separate IRA Change Investment Form for each account.

Where to return your form(s):
You may return your completed form to your nearest Branch, or mail to:

Retirement Plan Services
P.O. Box 769001
San Antonio, TX 78245-9951

If you have any questions
Call Retirement Plan Services at 1-800-695-5911.[2] Hearing or speech impaired customers may call our text telephone service (TTY) at 1-800-788-6775. Representatives are available to assist you Monday through Friday 8:00 a.m. – 10:00 p.m. Eastern Time, and Saturday 9:00 a.m. – 5:30 p.m. Eastern Time.

Footnotes:

[1] *Effective November 15, 2021, the 18 Month Variable Rate Retirement CD is no longer available for new accounts, including term changes for existing Retirement CD accounts. Existing 18 Month Variable Rate Retirement CDs that mature on or after January 24, 2022, will renew to a 3 Month Fixed Rate Retirement CD, unless you request a change by the maturity date. Please refer to the November 2021 "Important Notice of Changes to 18 Month Variable Rate Retirement CD Accounts."*

[2] *To ensure quality service, calls are recorded.*

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A. Account Owner Information

Plan Type: ☐ Traditional IRA ☐ Roth IRA ☐ Rollover IRA ☐ SEP-IRA

Social Security Number: ________________________ Date of Birth: ________________________

☐ Mr. ☐ Mrs. ☐ Ms.

First Name: ___________________________ Middle: ___________________________ Last Name: ______________________________

Current Address

Address: ____

City: ________________________________ State: ________________________________ Zip: __________________________________

Home Telephone: ____________________ Business Telephone: ____________________

☐ Check here if this is a new address (if checked, please provide Previous Address).

Previous Address

Address: ____

City: ________________________________ State: ________________________________ Zip: __________________________________

B. Investment Change (Please refer to important things to remember on the previous page)

You may use this section to change any Traditional IRA, Roth IRA, or SEP-IRA investment including CDs and Insured Money Market Accounts (IMMA).

1. **Existing Investment** Indicate the account number you are authorizing us to reinvest: ______________________________________

   Account Type: ☐ CD[1] ☐ Insured Money Market Accounts (IMMA)

   Select terms from both sections A and B below:

   A. ☐ Immediately **or** ☐ At Maturity on _______________ **B.** ☐ Entire account balance **or** ☐ Specific amount $ _____________

   (Please note: There are early withdrawal penalties if you terminate a time deposit before maturity.)

2. **New Investment** Please choose your investments in accordance with your Citibank IRA Plan Documents.

   ☐ **CD**[1]

Term	Amount
_____________	$_____________ (Minimum Investment $250)
_____________	$_____________ (Minimum Investment $250)
_____________	$_____________ (Minimum Investment $250)

☐ **Insured Money Market Accounts (IMMA):** $_______________

Footnotes:

[1] *Effective November 15, 2021, the 18 Month Variable Rate Retirement CD is no longer available for new accounts, including term changes for existing Retirement CD accounts. Existing 18 Month Variable Rate Retirement CDs that mature on or after January 24, 2022, will renew to a 3 Month Fixed Rate Retirement CD, unless you request a change by the maturity date. Please refer to the November 2021 "Important Notice of Changes to 18 Month Variable Rate Retirement CD Accounts."*

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C. Add to Your Maturing CD

Unless indicated below, contributions received between January 1 and April 15 will be treated as current year contributions. Prior year contribution amounts received which exceed the maximum prior year contribution will be applied to the current year. Contribution information is reported to the participant and the IRS on Form 5498.

For tax year 20 ______add the amount of $ ______________ to the maturing CD indicated in Section B.

D. Your Acceptance

By signing below, I authorize, certify and/or acknowledge that:

- I have received, read and agree to the terms and conditions for the investment(s) option selected above;
- For insured options, I have been advised of any applicable early withdrawal penalties stated in such rules;
- If I have made an additional contribution, I certify that the contribution is made for the tax year indicated;
- Insured Money Market Accounts (IMMA) and CDs are deposits of Citibank, N.A.

▶ Account Owner's Signature: ____ ▶ Date: ______________________________

You will receive a confirmation of your investment changes.

BRANCH: Be sure to date stamp this application

Rep:__________ Branch #: _________ Rep. Print: ________________________________

Rep. Signature: ____

Retirement Plan Services Use Only:

NEW A/C: __________________

TXN: _______________________

EFF DT: _____________________

AMT: _______________________

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