

Notification of Divorce and Transfer Instructions



INSTRUCTIONS AND GUIDELINES

Use this form to facilitate the division of a Sterling Trust ("Sterling") self-directed IRA as a result of divorce proceedings. This form is required along with a copy of the filed court order (i.e., filed divorce decree, QDRO) and must be signed by the Account Holder and the former spouse. Additional forms are also needed as indicated based on transfer instructions.



SUBMISSION OPTIONS

OVERNIGHT:

Sterling Trust
1101 Wooded Acres
Suite 120
Waco, TX 76710

REGULAR MAIL:

Sterling Trust
P. O. Box 2526
Waco, TX 76702-2526

FAX:

254-751-0872

E-MAIL:

IRAServices@SterlingTrustCompany.com



CONTACT INFORMATION

MAILING ADDRESS:

Sterling Trust
P. O. Box 2526
Waco, TX 76702-2526

PHYSICAL ADDRESS:

Sterling Trust
1101 Wooded Acres
Suite 120
Waco, TX 76710

**For assistance, please contact a Client
Service Representative at:**

Phone:

800-955-3434 (Option 2)
254-751-1505 (Option 2)

Fax:

254-751-0872

Website:

www.SterlingTrustCompany.com

Or e-mail questions to:

IRAServices@SterlingTrustCompany.com

