

**RE: MBA Investments via IRA \_\_\_\_\_ (choose one of the following)**

**CLOSED ACCOUNT**

\_\_\_\_\_ Although I invested in MBA using funds from an IRA account I took a distribution on all remaining funds and bore the related tax liability consequences from the disbursement. Because I no longer wish to utilize this IRA account, I hereby request and authorize the Receiver to calculate and pay all distributions on my Approved Claim directly to me. I understand and accept responsibility for all tax liability consequences regarding the portion of the distribution paid to me that was derived from IRA funds invested with MBA.

Any distribution should be sent to me at:

Investor Name \_\_\_\_\_

Investor Address \_\_\_\_\_

\_\_\_\_\_

Investor social security # \_\_\_\_\_

**CHANGED ACCOUNT**

\_\_\_\_\_ I invested in MBA using funds from IRA Account No. \_\_\_\_\_, however I have closed or no longer wish to utilize that account. Please forward any distributions to the following IRA account for my benefit:

IRA Fund Name \_\_\_\_\_

IRA Investor Name \_\_\_\_\_

IRA Investor Account # \_\_\_\_\_

ADDRESS IRA Fund \_\_\_\_\_

Phone No. IRA Fund \_\_\_\_\_

IRA Investor Social Security # \_\_\_\_\_

INVESTOR Mailing address) \_\_\_\_\_

\_\_\_\_\_

Investor signature \_\_\_\_\_

Please return via email to [ssloane@haysconsulting.net](mailto:ssloane@haysconsulting.net)

Or by fax to: Shuwanda Sloane at 404-926-0055

or by mail to:

MBA Investor Claims

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