

Important Information about your Green Pier IRA

Please note that there are a few features of the Green Pier IRA that are not available digitally. For any of the following please contact the service team for further instructions on how to:

- Open an Inherited IRA due to a death;
- Return excess IRA contributions;
- Divide your IRA upon your divorce; or
- Set up ACATS in and out of your IRA, which is a method to move securities and cash between accounts at different brokerage firms.

The following features are not supported at this time:

- Rollover contributions from an employer-sponsored plan or another IRA, including non-spouse direct rollover to an inherited IRA;
- Convert from your Traditional IRA to your Roth IRA;
- Recharacterize contributions;
- IRAs for minors;
- Minors as beneficiaries;
- Inherited IRAs for minors, trusts or entities;
- Charitable distributions;
- 3rd party ACH, including direct payment of tax refunds as contribution to IRA; and
- Per stirpes beneficiary designations.

Available services, features, and terms and conditions may change from time to time.