

March 2021

RE: BRANCH CLOSING; 3600 NELSON ROAD – July 9, 2021 | INDIVIDUAL RETIREMENT ACCOUNT

Dear Valued Member,

As a Member of the Jefferson Financial FCU Lake Charles Branch, we are writing to inform you that **July 9, 2021, will be the last day of operations for the branch.** Despite the closure, the Lake Charles area will continue to remain in Jefferson Financial's Field of Membership – even after the closing date.

Our records indicate you have an **Individual Retirement Account (IRA)** with us. If you choose to keep your IRA with Jefferson Financial, you will be able process transactions through the IRA Department. Any forms requiring signatures can be done electronically (as long as you have an email address on file) or by mail; however, please be advised that signing/sending paperwork by mail may require a notary. If you use/plan to use Online Banking, you will only be able to view your IRA.

If you wish to transfer your IRA to another Financial Institution, please have them mail a Transfer Request Form to the following address so we can make the transition as smooth as possible: *Jefferson Financial FCU, ATTN: IRA Department, 7701 Airline Drive | Metairie, LA 70003.*

Before you make any final decisions as to how you would like to proceed with your IRA, please consult a tax advisor as there may be tax consequences.

Please contact us at 800.259.2471 ext. 777 or by email at RetirementServices@JeffersonFinancial.org if you have any questions or concerns regarding your IRA. We apologize for any inconvenience.

We want to **Thank You** for the many years you have allowed us to serve you and your community. We will work diligently to assist you during this transition.

Sincerely,

IRA Department
Jefferson Financial FCU

