



GENERAL GUIDELINES

The following coupon must be remitted with all contribution and rollover deposits in the form of a check or wire.

Additional coupons can be obtained 24 hours a day, 7 days a week by visiting the client forms page of our website, www.trustetc.com/forms. Or by contacting your First Class Service Team Monday - Friday 9:00 am to 6:00 pm EST.

FEES

- \$30.00 fee for funds received by wire

SUBMISSION OPTIONS

BY FAX:

(440) 366-3751

OVERNIGHT:

Equity Trust Company
1 Equity Way
Westlake, OH 44145

REGULAR MAIL:

Equity Trust Company
P. O. Box 45290
Westlake, OH 44145

BY E-MAIL:

help@trustetc.com

ALTERNATIVE CONTRIBUTION METHOD:

- **ACH DEPOSITS:**
Allows you to make automatic contributions from your checking or savings accounts FREE. For more information contact your First Class Service Team or visit www.trustetc.com.

CONTACT INFORMATION

PHYSICAL ADDRESS:

Equity Trust Company
1 Equity Way
Westlake, OH 44145

PHONE #:

(440) 323-5491

WEBSITE:

www.trustetc.com

For assistance, please contact a member of your First Class Service Team at:

TOLL FREE:

(877) 693-8208

Or e-mail questions to:

E-MAIL:

help@trustetc.com

CHECK INSTRUCTIONS

- MAKE CHECKS PAYABLE TO:
ETC Custodian FBO "Account Owner's Name" IRA.

John Smith 1001 Lake Blvd Cleveland, OH 44145	DATE: 05/01/15	CHK # 00 0000 0000
PAY TO <u>ETC Custodian FBO John Smith</u>	\$3,000	
<u>Three Thousand and</u>	<u>00/100</u>	
MEMO: <u>Acct # 123456789</u>	<u>John Smith</u>	

- Please include the Account Number on the memo line of the check.

WIRING INSTRUCTIONS

- Please complete the *CONTRIBUTION/ROLLOVER COUPON* on the following page and **SUBMIT PRIOR TO THE WIRE BEING SENT**. Wires received without prior notification may cause delays in processing.
- The \$30 incoming wire fee will automatically be deducted from the account.
- If you wish to pay the wire fee by credit card, please submit the *Credit Card Form* along with your coupon.

Wiring Funds to Equity Trust:

- **Wire to:** Citibank
451 Montgomery Street
San Francisco, CA 94104
RT # if wire originates in the US: 321171184
- **For Credit to:** Equity Trust Company
Account #: 205575210
- **For Further Credit:** Account Owner's Name
IRA Account Number

For information regarding international wires and ACH instructions please visit: www.trustetc.com

DO NOT FAX OR MAIL THIS COVER PAGE

INVESTMENT PRODUCTS: NOT FDIC INSURED - NO BANK GUARANTEE - MAY LOSE VALUE



CONTRIBUTION/ROLLOVER COUPON

Please DO NOT staple or tape coupon to the check

ACCOUNT HOLDER NAME	
ACCOUNT NUMBER	DEPOSIT AMOUNT
CHECK NUMBER	WIRE TRANSFER DATE
EMAIL ADDRESS	

Deposit Type	
<input type="checkbox"/> Contribution	For Tax Year _____
<input type="checkbox"/> Rollover	For Tax Year _____
Contribution/Rollover Account Type	
<input type="checkbox"/> Traditional	<input type="checkbox"/> Education (CESA)
<input type="checkbox"/> Roth	<input type="checkbox"/> HSA
<input type="checkbox"/> SEP	<input type="checkbox"/> Individual K
<input type="checkbox"/> SIMPLE	<input type="checkbox"/> Roth Individual K

Make Checks Payable To: ETC Custodian FBO "Account Owner's Name" IRA.

P. O. BOX 45290 • WESTLAKE, OH 44145 • PHONE: (877) 693-8208 • FAX: (440) 366-3751 • WWW.TRUSTETC.COM • EMAIL: HELP@TRUSTETC.COM



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