

CONTRIBUTION/ **ROLLOVER COUPON**

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

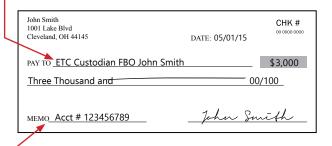
Or e-mail questions to:

E-MAIL:

help@trustetc.com

CHECK INSTRUCTIONS

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



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

451Montgomery 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		
☐ Contribution	For Tax Year	
☐ Rollover	For Tax Year	
Contribution/Rollover Account Type		
☐ Traditional	☐ Education (CESA)	
☐ Roth	☐ HSA	
☐ SEP	☐ Individual K	
☐ SIMPLE	☐ Roth Individual K	

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

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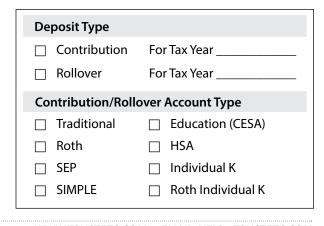


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ACCOUNT HOLDER NAME	
ACCOUNT NUMBER	DEPOSIT AMOUNT
CHECK NUMBER	WIRE TRANSFER DATE
C.I.E.C.K.TO.III.E.I.K	7777
EMAIL ADDRESS	
ENIME MODILESS	

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



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

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

 Deposit Type

 □ Contribution
 For Tax Year ______

 □ Rollover
 For Tax Year _______

 Contribution/Rollover Account Type

 □ Traditional
 □ Education (CESA)

 □ Roth
 □ HSA

 □ SEP
 □ Individual K

 □ SIMPLE
 □ Roth Individual K

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