



Self Directed IRA

S E R V I C E S I N C

A subsidiary of Horizon Bank

215 Mary Avenue, Suite 311 • Waco, TX 76701
866.928.9394 • 512.637.5739 • Operations@sdiraservices.com
www.SDIRAServices.com

Deposit Coupon

Instructions and Form

Use this form to remit with any contribution, rollover or investment-related deposit or payment made to your IRA account.

Guidelines

The following form should be completed and remitted with any contribution, rollover or investment-related deposit made to your IRA account, whether by check or bank wire.

- ✔ Please use the appropriate investment direction form if you wish to provide investment instructions. Do not include any written investment instructions on the Deposit Coupon.
- ✔ Please include a separate Deposit Coupon for each check or wire.
- ✔ Additional Deposit Coupons can be obtained by visiting the Forms section of our website, www.SDIRAServices.com.

Check Instructions

- ✔ Make checks payable to: **Self Directed IRA Services, Inc. Custodian FBO (Accountholder Name) IRA # _____.**
- ✔ Please include your IRA account number on the memo line of the check.

Wiring Instructions

- ✔ Please complete and submit the Deposit Coupon **prior to the wire being sent.** Wires received without prior notification may cause delays in processing.

Funds should be wired to your IRA account with Self Directed IRA Services, Inc. as follows:

Wire to:	Horizon Bank 600 Congress Ave. Austin, TX 78701 ABA: 111907940
For Credit To:	Self Directed IRA Services Custodial Account Account #: 4515532
For Further Credit To:	Accountholder's Name, IRA # _____

Send your completed Deposit Coupon to us.

Mail or Email



Self Directed IRA Services, Inc.
P.O. Box 23149
Waco, TX 76702

Operations@sdiraservices.com

Physical Delivery



Self Directed IRA Services, Inc.
215 Mary Avenue, Suite 311
Waco, TX 76701

Fax



Fax to 512.495.9554
Attn: Accounting



Self Directed IRA

SERVICES INC

A subsidiary of Horizon Bank

Deposit Coupon

215 Mary Avenue, Suite 311 • Waco, TX 76701 • Operations@sdiraservices.com
 Phone 512.637.5739 • Fax 512.495.9554 • www.SDIRAServices.com

Please complete all applicable information on the Deposit Coupon and submit along with the check. If funds are being wired, please fax this Deposit Coupon to the attention of "Accounting" prior to the wire transfer.

1 Account Information

Accountholder Name		Account Number
Daytime Phone	Email Address	
Account Type	<input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> SEP <input type="checkbox"/> SIMPLE	
Deposit Amount	Check Number	Wire Transfer Date

2 Specify Type of Deposit

• **Contribution or Rollover Deposit** Accountholder must sign and date Section 3 below.

- Contribution For Tax Year _____ (SEP contributions are reported in the year received.)
- Rollover

• **Investment-Related Deposit** Must specify name of the investment below.

Investment or Property Name

- Note or Debt Payment:** Must complete the payment information below, including any interest and principal breakdown.

Interest \$	Principal \$	Other _____ \$ _____
New Ending Balance on the Note/Debt \$		Note Payoff: _____ Partial _____ Full

- | | |
|--|---|
| <input type="checkbox"/> Return of Capital | <input type="checkbox"/> Dividend |
| <input type="checkbox"/> Rental Income | <input type="checkbox"/> Late Payments \$ _____ |
| <input type="checkbox"/> Partial Sale Proceeds | <input type="checkbox"/> Complete Sale Proceeds |

3 Signature Accountholder must sign and date below if deposit is a Contribution or Rollover.

I hereby certify that all information provided is true and correct and may be relied on by SDIRA Services.

If making a Contribution, the undersigned understands the terms and conditions applicable to the IRA account are contained in the IRA plan agreement and agrees to be bound by those terms and conditions. The undersigned certifies that (i) the eligibility requirements have been met for making the type of IRA contribution indicated above, (ii) accountholder assumes complete responsibility for ensuring that all IRA contributions made are within the limits set by the tax laws, related regulations and plan agreement and for the tax consequences of any contributions (including any rollover and conversion contributions) and distributions, and (iii) the deposit described above is eligible to be contributed to the IRA.

If making a Rollover, the undersigned Accountholder understands the rules and conditions applicable to direct rollovers and certifies that (i) the requirements have been met for making a direct rollover of the funds shown above (ii) all funds are being deposited within the allowable 60 day period since distributed to me, (iii) this is the only rollover for or by me within the previous 12 month period, and (iv) none of the assets being deposited contain amounts from a Required Minimum Distribution. I acknowledge that I have been advised to see a tax professional due to the important tax consequences of rollovers. I assume full responsibility for this rollover transaction and will not hold Self Directed IRA Services, Inc. (SDIRA Services") liable for any adverse consequences that may result. I hereby irrevocably designate the rollover amount shown above as a rollover contribution.

Accountholder Signature _____ Date _____