EQUITY TRUST COMPANY ®

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 451340
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.

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 44035

CHK #
00 0000 0000

DATE: 06/01/12

PAY TO _ETC Custodian FBO John Smith, IRA_ $3,000

Three Thousand and 00/100

MEMO _Acct # 123456789_ _John Smith_

- 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
  ABA: 321171184

- **For Credit to:** Equity Trust Company
  Westlake, OH 44145
  Account #: 204007330

- **For Further Credit:** Account Owner's Name
  IRA Account Number

DO NOT FAX OR MAIL THIS COVER PAGE

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

CONTRIBUTION/ROLLOVER COUPON

EQUITY TRUST COMPANY®

Please DO NOT staple or tape coupon to the check

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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