



GENERAL GUIDELINES

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

- Do not include any investment instructions on the **Deposit Coupon**.
- Please include a separate **Deposit Coupon** for each check or wire. (**NOTE: Please fax deposit coupon prior to wire transfer.**)
- Additional **Deposit Coupons** can be obtained 24 hours a day, 7 days a week by visiting the Online forms section of our website, www.TrustETC.com.

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

CONTACT INFORMATION

For assistance, please contact a Client Service Representative at:

Phone:

877-693-8208

Fax:

440-366-3751

Website:

www.TrustETC.com

Or e-mail questions to:

Help@TrustETC.com

CHECK INSTRUCTIONS

• MAKE CHECKS PAYABLE TO:

Equity Trust Company (ETC), Custodian FBO "Account Holder'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
Three Thousand and _____		00/100
MEMO <u>Acct # 123456789</u>	<u>John Smith</u>	

- Please include the Equity Trust Company account number on the memo line of the check.

WIRING INSTRUCTIONS

- Please complete the **Deposit Coupon** on the following page and **SUBMIT PRIOR TO THE WIRE BEING SENT**. Wires received without prior notification may cause delays in processing.
- The 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. (**Fee must be paid prior to funds being wired. No reimbursements will be made if fee is deducted from the account.**)

Wiring Funds to Equity Trust Company:

- **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 Holder's Name,
IRA Account Number

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

DO NOT FAX OR MAIL THIS COVER PAGE

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



DEPOSIT COUPON

DO NOT staple or tape coupon to the check. Make Checks Payable To: Equity Trust Company, Custodian FBO "Account Holder's Name, Account Number" If funds are being wired, please fax this Deposit Coupon prior to the wire transfer.

ACCOUNT HOLDER NAME
ACCOUNT NUMBER DEPOSIT AMOUNT CHECK NUMBER
EXPECTED WIRE TRANSFER DATE ASSET NUMBER
INVESTMENT NAME

**For Note/Debt Payments, provide the Principal and Interest breakdown.

Interest \$ Principal \$ Other \$
New Ending Balance on the Note/Debt \$

Deposit Type
Principal Return of Capital
Interest Refund
Rental Income Settlement
Dividend Redemption
Oil & Gas Income Sale of Asset
Contribution For Tax Year
Rollover For Tax Year
SEP Contributions are reported in the year received.

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