



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 www.myequity.com, or by contacting a Client Service Representative Monday - Friday 9:00 am to 6:00 pm EST.

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 ETC Custodian FBO John Smith \$3,000

Three Thousand and 00/100

MEMO: Acct # 123456789 *John Smith*

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

SUBMISSION OPTIONS

BY FAX:
(440) 366-3751

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

OVERNIGHT:
Equity Trust Company
1 Equity Way
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.

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.
- Additional fees may apply, please see current fee schedule. Fee will automatically be deducted from the account unless otherwise specified.
- If you wish to pay the wire fee by credit card, please visit www.myequity.com or contact Equity Trust Company at (888) 382-4727.

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

CONTACT INFORMATION

PHYSICAL ADDRESS:
Equity Trust Company
1 Equity Way
Westlake, OH 44145

For assistance, please contact a Client Service Representative at:

TOLL FREE:
(877) 693-8208

PHONE #:
(440) 323-5491

Or e-mail questions to:

E-MAIL:
help@trustetc.com

WEBSITE:
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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