



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 www.myequity.com.

SUBMISSION OPTIONS

BY FAX

440-365-1445

OVERNIGHT

Equity Trust Company
Attn: Institutional Accounts
1 Equity Way
Westlake, OH 44145

REGULAR MAIL

Equity Trust Company
Attn: Institutional Accounts
P. O. Box 451159
Westlake, OH 44145

BY E-MAIL

Help@TrustETC.com

CONTACT INFORMATION

For assistance, please contact a Client Service Representative at:

Phone:

800-955-3434

Fax:

440-365-1445

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: 12/21/19

CHK #
00 0000 0000

PAY TO ETC Custodian FBO Jane Doe, IRA \$ 3,000.00

Three Thousand and _____ 00/100

MEMO Acct # 123456789 *John Smith*

- 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 visit www.myequity.com. (**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	
ASSET NAME		
FOR SPLIT PAYMENTS, PLEASE PROVIDE A BREAKDOWN BELOW:		
Note/Debt Payments		
Interest \$	Principal \$	Other \$
New Ending Balance on the Note/Debt \$		
Private Equity Payments		
Dividend \$	Return of Capital \$	Other \$

Deposit Type	
<input type="checkbox"/> Principal	<input type="checkbox"/> Return of Capital
<input type="checkbox"/> Interest	<input type="checkbox"/> Dividend
<input type="checkbox"/> Rental Income	<input type="checkbox"/> Refund
<input type="checkbox"/> Oil & Gas Income	<input type="checkbox"/> Settlement
<input type="checkbox"/> Redemption	<input type="checkbox"/> Sale of Asset
<input type="checkbox"/> Other	
<input type="checkbox"/> Contribution	For Tax Year _____
<input type="checkbox"/> Rollover	For Tax Year _____
<i>SEP Contributions are reported in the year received.</i>	



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	
ASSET NAME		
FOR SPLIT PAYMENTS, PLEASE PROVIDE A BREAKDOWN BELOW:		
Note/Debt Payments		
Interest \$	Principal \$	Other \$
New Ending Balance on the Note/Debt \$		
Private Equity Payments		
Dividend \$	Return of Capital \$	Other \$

Deposit Type	
<input type="checkbox"/> Principal	<input type="checkbox"/> Return of Capital
<input type="checkbox"/> Interest	<input type="checkbox"/> Dividend
<input type="checkbox"/> Rental Income	<input type="checkbox"/> Refund
<input type="checkbox"/> Oil & Gas Income	<input type="checkbox"/> Settlement
<input type="checkbox"/> Redemption	<input type="checkbox"/> Sale of Asset
<input type="checkbox"/> Other	
<input type="checkbox"/> Contribution	For Tax Year _____
<input type="checkbox"/> Rollover	For Tax Year _____
<i>SEP Contributions are reported in the year received.</i>	



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	
ASSET NAME		
FOR SPLIT PAYMENTS, PLEASE PROVIDE A BREAKDOWN BELOW:		
Note/Debt Payments		
Interest \$	Principal \$	Other \$
New Ending Balance on the Note/Debt \$		
Private Equity Payments		
Dividend \$	Return of Capital \$	Other \$

Deposit Type	
<input type="checkbox"/> Principal	<input type="checkbox"/> Return of Capital
<input type="checkbox"/> Interest	<input type="checkbox"/> Dividend
<input type="checkbox"/> Rental Income	<input type="checkbox"/> Refund
<input type="checkbox"/> Oil & Gas Income	<input type="checkbox"/> Settlement
<input type="checkbox"/> Redemption	<input type="checkbox"/> Sale of Asset
<input type="checkbox"/> Other	
<input type="checkbox"/> Contribution	For Tax Year _____
<input type="checkbox"/> Rollover	For Tax Year _____
<i>SEP Contributions are reported in the year received.</i>	