

# Need an Easy Way to Contribute to Your Account?

Automated Clearing House (ACH) allows you to make automatic contributions from your checking or savings account and it's FREE. **To sign up for ACH, please complete the form below and fax it to (440) 366-3751.**

## Authorization Agreement for Automated Clearing House (ACH) Debits

I hereby authorize Equity Trust Company, through United Western Bank, to initiate debit entries to my account at the Financial Institution indicated below and for the Financial Institution to debit the same to such an account through the Automated Clearing House (ACH) system, subject to the rules of the Financial Institution.

### IRA Account Owner Information

Name: \_\_\_\_\_ Phone Number: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_

Your IRA Account Number: \_\_\_\_\_ Your SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

### Bank Information

Bank Name: \_\_\_\_\_ Bank Phone: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_

Bank City: \_\_\_\_\_ State: \_\_\_\_\_

Routing Number (ABA): \_\_\_\_\_ (9 digits)

Account Number: \_\_\_\_\_ Name on Account: \_\_\_\_\_

Type of Account (check one):  Checking  Savings

Timing of debit (check one): \_\_\_\_\_ Bi-monthly \_\_\_\_\_ Monthly \_\_\_\_\_ Quarterly

Amount of debit\*: \$ \_\_\_\_\_

Date each month for debit (i.e. 15th): \_\_\_\_\_ (Fill in both spaces for bi-monthly contributions)

### Please attach a copy of a voided check or deposit slip for your account to this form.

This authorization, including any credit or debit entries initiated hereafter, is in full force and effect until I notify Equity Trust Company of its revocation in writing and Equity Trust Company has had sufficient time to act on it.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\*Annual contribution limits for IRAs are \$5,000 or \$6,000 if over 50. Any contributions made will be applied to the calendar year it was received unless Equity Trust Company is otherwise notified by the client before the tax filing deadline.

**EQUITY TRUST COMPANY**