

# EQUITY TRUST COMPANY

## CONTRIBUTION/ROLLOVER COUPONS

### 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](http://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  
225 Burns Road  
Elyria, OH 44035

**REGULAR MAIL:**  
Equity Trust Company  
P.O. Box 599  
Elyria, OH 44036

**BY E-MAIL:**  
[help@trustetc.com](mailto:help@trustetc.com)

#### ALTERNATIVE CONTRIBUTION METHODS:

- **NEW! ACH DEPOSITS:**  
Allows you to make automatic contributions from your checking or savings accounts FREE. For more information contact your First Class Service Team
- **eVANTAGE:**  
LOG ONTO eVANTAGE NOW by visiting the website at <https://forms.trustetc.com/eVantage>

### CONTACT INFORMATION



**PHYSICAL ADDRESS:**  
Equity Trust Company  
225 Burns Road  
Elyria, OH 44035

**PHONE #:**  
(440) 323-5491

**WEBSITE:**  
[www.trustetc.com](http://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](mailto: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	DATE: <b>06/01/07</b>	CHK # 00-00000000
PAY TO <b>ETC Custodian FBO John Smith, IRA</b>		\$ <b>2,000</b>
<b>Two Thousand and -----00/100</b>		
MEMO <b>Acct # 12345</b>		<i>John Smith</i>

- Please include the ETC 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 contact your First Class Service Team for further assistance.

#### Wiring Funds to Equity Trust:

- **Wire to:** Citibank  
451 Montgomery Street  
San Francisco, CA 94104  
ABA: 321171184
- **For Credit to:** Equity Trust Company  
Elyria, OH 44035  
Account #: 204007330
- **For Further Credit:** Account Owner's Name  
IRA Account Number

**DO NOT FAX OR MAIL THIS COVER PAGE**

# EQUITY TRUST COMPANY®

P.O. BOX 599 • ELYRIA, OHIO 44036 • PHONE: (877) 693-8208 • FAX: (440) 366-3751 • WWW.TRUSTETC.COM • EMAIL: HELP@TRUSTETC.COM

## Contribution/Rollover Coupon

Please DO NOT staple or tape coupon to the check

Account Owner Name \_\_\_\_\_

Account Number \_\_\_\_\_

Check Number \_\_\_\_\_

Deposit Amount \_\_\_\_\_

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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