

THE 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. Or by contacting your First Class Service Team Monday - Friday 8:30 am to 7:00 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

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

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

CHECK INSTRUCTIONS



MAKE CHECKS PAYABLE TO:
ETC Custodian FBO "Account Owner's Name" IRA.

John Smith 1001 Lake Blvd Cleveland, OH 44035	DATE: 06/01/07	CHK # 00-00000000
PAY TO ETC Custodian FBO John Smith, IRA		\$ 2,000
Two Thousand and -----00/100		
MEMO Acct # 12345		<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:** United Western Bank
Denver, CO 80202
ABA: 102089534
- **For Credit to:** Equity Trust Company
Elyria, OH 44035
Account #: 5838000304
- **For Further Credit:** Account Owner's Name
IRA Account Number

DO NOT FAX OR MAIL THIS COVER PAGE

EQUITY TRUST COMPANY

Contribution/Rollover Coupon

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

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 _____
- Conversion For Current Tax Year

Contribution/Rollover Account Type

- Traditional Education (CESA)
- Roth HSA
- SEP Individual K
- SIMPLE Roth Individual K

EQUITY TRUST COMPANY

Contribution/Rollover Coupon

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

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 _____
- Conversion For Current Tax Year

Contribution/Rollover Account Type

- Traditional Education (CESA)
- Roth HSA
- SEP Individual K
- SIMPLE Roth Individual K

EQUITY TRUST COMPANY

Contribution/Rollover Coupon

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

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 _____
- Conversion For Current Tax Year

Contribution/Rollover Account Type

- Traditional Education (CESA)
- Roth HSA
- SEP Individual K
- SIMPLE Roth Individual K