

Account Number:

This form must be remitted with **all** initial funding checks included with your Account Application and deposits made to your account after any initial funding you made at the time you established your account. The form must include the Account Holder's name and account number. In addition, contributions must reflect the year to which the deposit applies.

1

ACCOUNT HOLDER INFORMATION

Legal Name: _____ Soc. Sec. Number: _____

Type of Account at IRA Plus Southwest, LLC (check one): Traditional IRA Roth IRA SEP IRA Simple IRA

2

PAYMENT INSTRUCTIONS

Check **MAKE CHECKS PAYABLE TO: IRA Plus Southwest, LLC FBO (Account Holder's Name) IRA # _____**

Wire **Submit this Contribution Designation form prior to sending a wire. (See wire instructions.)**

3

CONTRIBUTION / ROLLOVER DEPOSIT *

	<u>Amount</u>		<u>Amount</u>
<input type="checkbox"/> IRA Contribution - Current year _____ Year	\$ _____	<input type="checkbox"/> SEP** Contribution - Current year _____ Year	\$ _____
<input type="checkbox"/> IRA Contribution - Previous year _____ Year	\$ _____	<input type="checkbox"/> SEP** Contribution - Previous Year _____ Year	\$ _____
<input type="checkbox"/> 60-day rollover from an IRA _____	\$ _____	<input type="checkbox"/> SIMPLE** Contribution - Current Year _____ Year	\$ _____
<input type="checkbox"/> 60-day rollover from an Employer Plan _____	\$ _____	<input type="checkbox"/> SIMPLE** Contribution - Previous Year _____ Year	\$ _____
<input type="checkbox"/> Direct Rollover from an Employer Plan _____	\$ _____	<input type="checkbox"/> 60 day rollover treated as Roth Conversion _____	\$ _____

**** SEP and SIMPLE contributions must be made by the employer sponsoring the SEP or SIMPLE.**

4

ACCOUNT HOLDER SIGNATURE

* Certification

I certify that I have correctly identified the source of the above referenced check/wire and hereby authorize the deposit of such check/wire to the account noted above. If this is a deposit for a contribution or rollover, I hereby certify that I understand the rules regarding contributions and rollovers and that this is a valid contribution or rollover contribution that meets all IRS requirements. If this is a rollover contribution, I irrevocably elect to designate this contribution of cash or property as a rollover contribution. If this is a deposit for a Roth Conversion, I hereby certify that I understand the rules regarding Roth Conversions and that this deposit is a valid Roth conversion that meets all the IRS Requirements

Printed Name: **X** _____

Signature: **X** _____ Date: **X** _____