



# Contribution Designation Form

## IMPORTANT INFORMATION

This form is to be used for a new contribution. Please complete and return this form with your check. Funds can also be sent via ACH or wire. Make checks payable to Directed Trust Company FBO (Account Owner Name)(Account Type).

### 1. Account Owner Information

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_

Last 4 of SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Phone Number: \_\_\_\_\_

Directed IRA Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_

### 2. Contribution Instructions

Credit my contribution as follows:

\$ \_\_\_\_\_ Traditional IRA For tax year: \_\_\_\_\_

\$ \_\_\_\_\_ Roth IRA For tax year: \_\_\_\_\_

\$ \_\_\_\_\_ Coverdell ESA For tax year: \_\_\_\_\_

\$ \_\_\_\_\_ HSA For tax year: \_\_\_\_\_

\$ \_\_\_\_\_ SEP IRA For tax year: \_\_\_\_\_

\$ \_\_\_\_\_ Other: \_\_\_\_\_

Total Amount Enclosed: \$ \_\_\_\_\_

### 3. Contribution Frequency

One-Time  Monthly  Quarterly  Annually Day of the month to be paid: \_\_\_\_\_

Date to begin payment (MM/DD/YY): \_\_\_\_\_ Date to end payment (MM/DD/YY): \_\_\_\_\_

Contribution made Via:  Check  ACH / Wire (Must be sent from the Account Owner)

### 4. Account Owner's Acknowledgement

Contribution limit information for IRA's, HSA's, & ESA's are based on federal law as stated in the Internal Revenue Code, and eligibility to contribute is dependent upon the tax filing status and personal situation of the contributor. I certify that I am aware of my specific contribution eligibility under any applicable state or federal laws.

I authorize Directed Trust Company ("Directed IRA") to deposit the funds into my Directed IRA account according to the instructions on this Contribution Designation Form. I understand that the deposit of funds into my account may have possible irrevocable tax consequences. I acknowledge that Directed IRA does not provide investment or tax advice and that I assume full responsibility for this transaction. I understand that ACH and Wire contributions are to be initiated by me, the account owner. Directed Trust Company cannot pull funds from account owners bank accounts.

I certify that the information provided above, and the elections made by and through this Contribution Designation Form, are true and correct.

➤ \_\_\_\_\_  
Account Owner Signature

\_\_\_\_\_  
Date

INVESTMENTS: NOT FDIC INSURED ■ NO GUARANTEE ■ MAY LOSE VALUE

Email Forms to:  
[Clients@directedira.com](mailto:Clients@directedira.com)

Send Mail to:  
3033 N. Central Ave. Ste. 415  
Phoenix, AZ 85012

Fax:  
602-899-9641

Questions?  
(800) 818-1322  
[Clients@directedira.com](mailto:Clients@directedira.com)

Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation



## Incoming Wire Transfer and ACH Instructions

### IMPORTANT INFORMATION

Electronic payments may be sent to your Directed IRA account using the following instructions:

#### Incoming Wire Transfers

All wires of funds to be deposited into a Directed Trust Company Account must be sent to:

Wells Fargo Bank, NA  
420 Montgomery Street  
San Francisco, CA 94104

ABA #: 121000248

Swift Code: WFBIUS6S

Directed Trust Company account number: 8450721009

The 'Additional Information' field of your wire must include: Directed Trust Company FBO "Client Name", "Account Type"

*Please note:* Title companies must include property address. The address above should be used for wired funds only. All checks made payable to a Directed IRA account must be mailed to the address noted on our website, [www.directedira.com](http://www.directedira.com).

#### Incoming ACH

ACH Format: CCD

Receiving Bank Routing Transit Number: 124002971

Directed Trust Company account number: 8450721009

#### Addenda Record Information

Account information: Directed Trust Company FBO "Client Name", "Account Type"

Asset ID or Asset description: As applicable

Transaction details such as:

- "Principal" with \$ amount and/or "Interest" with \$ amount
- "Contribution" with Tax Year
- "Rental Income"
- "Payoff/ Liquidation"
- "Dividend Payment"
- "Transfer Funds"
- "Rollover Funds"
- "Misc. Payment" with description (e.g., "Escrow Refund")

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