

Investment Income Deposit Form

IMPORTANT INFORMATION

This form should be used to submit a deposit to a Directed IRA Account related to an investment held within the Account. A separate form must be submitted for each deposit being made. Deposits should be remitted by check or wire.

- Checks should be made payable to: **Directed Trust Company FBO (Account Owner Name)(Account Type)**.
- Funds submitted directly from the Account Owner or any disqualified person's bank account will not be accepted.
- You may be contacted if additional information is needed. Unclear or incomplete information will delay the deposit of funds.
- If a check is returned for insufficient funds, a return check fee will apply.

Remit check deposit & completed form to:

Directed IRA
3033 North Central Ave. Suite 415
Phoenix, AZ 85012

If wiring funds, fax or email this form prior to sending wire:

Fax: 602-899-9641
Email: Investments@directedira.com

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. Investment Deposit Coupon

Remitter's Name: _____ Remitter Is: Borrower Account Owner Other: _____

Email Address: _____ Phone Number: _____

Full Investment Name*: _____

**For Promissory Notes, please indicate Borrower's name, interest rate, and maturity date.*

Deposit Amount: \$ _____ Check Number: _____ Expected Wire Date (if applicable): ____/____/____/

Deposit Type

Rental Income Proceeds from Sale Return of Capital Dividends Other: _____


3. Income Frequency

One-Time Monthly Quarterly Annually **Day of the month to be received:** _____

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

4. Acknowledgment & Signature

I hereby request the above referenced funds be deposited into my account as specified above. I further represent that such funds are the investment income, investment proceeds, or capital of my Account's investment.

 _____
Account Owner Signature

Date

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

Email Forms to:
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

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