

Contribution Designation

IMPORTANT INFORMATION

This form is to be used for a new contribution. To initiate the contribution, funds can be sent via check, wire or ACH. Please complete and return this form along with your payment. ***Note: Directed IRA cannot pull funds from the account owner's bank account. Further instructions to send the payment are attached to this form.**

1. Account Owner Information

First Name: _____ MI: _____ Last Name: _____

Last 4 of SSN: _____ Date of Birth: _____ Phone Number: _____

Please list all **Directed IRA Account Number(s)** you are contributing to: _____

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: _____

\$ _____ Employer Contribution For tax year: _____

\$ _____ Employee Contribution For tax year: _____

Total Amount Enclosed: \$ _____

3. Contribution Frequency

Submitted via: Check ACH / Wire (Must be sent from the Account Owner)


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

4. Account Owner's Acknowledgement

Contribution limit information for IRAs, HSAs, & ESAs 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.

Please note electronic signatures on this form must include the electronic signature Certification page or Certification Stamp. If one is not included, we will not accept this form.

 _____
Account Owner Signature

Date

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

[Secure File Upload](#)

www.directedira.com/secureupload

Email Forms to:

Accounting@directedira.com

Send Mail to:

3033 N. Central Ave. Ste. 415
Phoenix, AZ 85012

Phone: (602) 899-9396

Fax: (602) 899-9641

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

Incoming Wire, ACH, and Check Instructions

IMPORTANT INFORMATION

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

Company Address:

Directed Trust Company
3033 North Central Avenue, Suite 415
Phoenix, AZ 85012

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.

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")

Incoming Check

Make Checks Payable to: Directed Trust Company
Memo: (Account Name) (Account Number)
Mail To: 3033 N. Central Ave, Ste 415, Phoenix, AZ 85012

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