

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 and include the (Account Owner Name)(Account Number) in the memo.**

- 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 this form and check to:
Directed Trust Company
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: Accounting@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 Information

Payor's Name: _____ Remitter Is: Borrower IRA/LLC Other: _____
Email Address: _____ Phone Number: _____
Asset Name*: _____

**For Promissory Note Payments, please indicate Borrower's name.*


Total Deposit Amount: \$ _____ Check Number: _____ Expected Wire Date (if applicable): ____/____/____
 Return of Capital Investment Income Note Payment: (Please indicate the note payment breakdown)
 Rental Income Other Interest: \$ _____ Principal: \$ _____

3. Income Frequency

One-Time Monthly Quarterly Annually **Day of the month to be received:** _____
Date to begin deposit (MM/DD/YY): _____ Date to end deposit (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 for the investment asset of my Account. 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](#) **Email Forms to:** Accounting@directedira.com **Send Mail to:** 3033 N. Central Ave. Ste. 415 **Phone:** (602) 899-9396
www.directedira.com/secureupload **Fax:** (602) 899-9641 Phoenix, AZ 85012

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