

Coverdell ESA Contribution Designation

IMPORTANT INFORMATION

This form is to be used for a new contribution to a Coverdell ESA. To initiate the contribution, funds can be sent via check, wire or ACH. Please complete and return this form along with your payment. **Further instructions to send the payment are included in this form.**

1. Responsible Individual Information for Account (parent/guardian of beneficiary) and Account Number

First Name: _____ MI: _____ Last Name: _____

Coverdell Account Number: _____

2. Designated Beneficiary of Coverdell Account (funds in the Coverdell are used for the beneficiaries qualifying education expenses)

First Name: _____ MI: _____ Last Name: _____

Date of Birth: _____

*The designated beneficiary must be under age 18 at time of Contribution***

3. Contribution Instruction and Information

Credit the Coverdell Account as follows (annual max of \$2,000 per Coverdell account).

Amount: \$ _____ For tax year: _____

4. Depositor Information – The depositor must qualify under IRC 530 and be within income limitations established by law (currently set at modified adjusted gross income of \$190,000 joint, \$95,000 single before phase-out amounts apply to contributions). I certify as the undersigned Depositor that I qualify to make the Contribution specified herein.

The Depositor is the same person as the Responsible Individual for the Account.

The Depositor is - Name: _____ Phone Number: _____

E-mail: _____

Contribution Submitted via: Check enclosed from Depositor Sent ACH/Wire (Must be sent from the Depositor)

5. Depositor Acknowledgement

Contributions to Coverdell ESAs are based on federal law and eligibility to contribute is dependent upon the tax filing status of the depositor pursuant to IRC 530. I certify that I am aware of my specific contribution eligibility as a Depositor under any applicable state or federal laws. I authorize Directed Trust Company ("Directed IRA") to deposit the funds into the Directed IRA account and understand that those funds and the Coverdell account itself are controlled by the Responsible Individual of the Account. I acknowledge that Directed IRA does not provide investment or tax advice. I understand that ACH and Wire contributions are to be initiated by me, the Depositor. I certify that the information provided above, and the elections made by and through this Coverdell ESA Contribution Designation, are true and correct. Electronic signatures must include a certification stamp.



Depositor's Signature

Date

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

[Secure File Upload](http://www.directedira.com/secureupload)

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 IRA Account Number

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 IRA Account Number

Transaction details such as:

- "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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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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