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 312-795-0988

# Deposit Form

Use this form to provide IRA Club with instructions to deposit funds to your IRA account.

## 1. Account Owner Information

First and Last Name: \_\_\_\_\_ IRA Club Account Number: \_\_\_\_\_

Last 4 of SSN: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

## 2. Type of Deposit

**Annual Contribution** for tax year \_\_\_\_\_ in the amount of \$ \_\_\_\_\_.

**Income or Liquidation from an Investment**

Asset Name: \_\_\_\_\_ Asset Type: \_\_\_\_\_

### Payment Type

- Rent \$ \_\_\_\_\_
- Proceeds from Sale \$ \_\_\_\_\_
- Loan Interest \$ \_\_\_\_\_
- Loan Payoff \$ \_\_\_\_\_
- Return of Capital \$ \_\_\_\_\_

**Rollover** from another IRA, 401(k) or other plan in the amount of \$ \_\_\_\_\_.

## 3. Space available for notes

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## 4. Authorization and Acknowledgement

By signing this Deposit Form, I hereby acknowledge that the above information is correct and authorize the deposit. I understand that I am allowed one indirect rollover from any other IRA or other qualified plan in the past 12 month period.

➤ Signature: \_\_\_\_\_ Date: \_\_\_\_\_