



# DEPOSIT FORM FOR CONTRIBUTIONS TO AN IRA, HSA OR 401(K)

**PLEASE NOTE:** Federal laws determine contribution limits for IRAs, HSAs, & 401(k)s as stated in the Internal Revenue Code. Eligibility to contribute is dependent on tax filing status and adjusted gross income.

## 1. ACCOUNT OWNER INFORMATION

FULL NAME	LAST 4 OF SSN
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## 2. CONTRIBUTION INFORMATION

IRA CLUB ACCOUNT NUMBER	ACCOUNT TYPE	AMOUNT	TAX YEAR

## 3. SUBMISSION INFORMATION

- VIA CHECK     VIA WIRE TRANSFER     VIA ACH
- CHARGE A CREDIT CARD TO MAKE AN ANNUAL CONTRIBUTION  
\*3.5% Processing Fee Applies

CREDIT/DEBIT CARD NUMBER	EXPIRATION DATE	CVV CODE
NAME ON CREDIT CARD		

## 4. ACKNOWLEDGEMENT AND SIGNATURE

By signing this form, I authorize IRA Club to deposit the funds to my account(s) according to the information on this form.

SIGNATURE	DATE SIGNED
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### HOW TO RETURN THIS FORM:

- ✓ Complete, Sign and Date the form.
- ✓ Fax, Email or Mail the form using the information below.

**QUESTIONS?** We are available via phone Monday-Friday between 9:00 AM - 5:00 PM CT - Call 312-795-0988

Rev. 21.6.16

FAX TO 312-283-2615

EMAIL: [DEPOSITS@IRA CLUB.ORG](mailto:DEPOSITS@IRA CLUB.ORG)

OVERNIGHT: 67 E. MADISON ST.  
SUITE 1510  
CHICAGO, IL 60603



## 2021 Annual Contribution Limits

### IRA - Traditional or ROTH

Age 49 and under	\$6,000
Age 50 and over	\$7,000

### Traditional IRA - Deductible Contribution Limits

Filing Status	Covered by Retirement Plan at Work	Adjusted Gross Income	May Deduct Contributions (not to exceed limits)
Single	No	Any amount	Full
Single	Yes	\$66,000 or less	Full
		\$66,000 - \$76,000	Partial
		\$76,000 or more	None
Married, filing jointly	You - No Spouse - Yes	\$198,000 or less	Full
		\$198,000 - \$208,000	Partial
		\$208,000 or more	None
Married, filing jointly	You - No Spouse - Yes	Any amount	Full
Married, filing jointly	You - Yes	\$105,000 or less	Full
		\$105,000 - \$125,000	Partial
		\$125,000 or more	None

### ROTH IRA - Contribution Limits

Filing Status	Adjusted Gross Income	Contributions Allowed
Single	\$125,000 or less	Full
	\$125,000 - \$140,000	Partial
	\$140,000 or more	None
Married, filing jointly	\$198,000 or less	Full
	\$198,000 - \$208,000	Partial
	\$208,000 or more	None

\* Note: Anyone can contribute to a Traditional IRA and convert to a ROTH IRA, otherwise known as a "backdoor" ROTH.

### SEP IRA

No age limit	25% of employee's compensation or \$58,000 (lesser of the two)
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### HSA

HSA single	\$3,600
HSA single 55 and older	\$4,600
HSA family	\$7,200
HSA family 55 and older	\$8,200