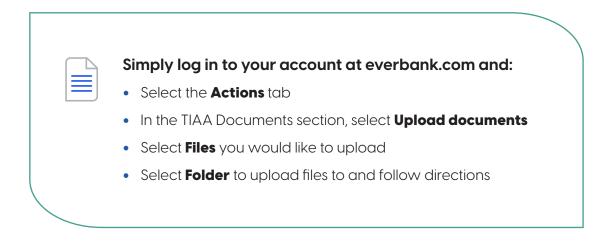


Submission instructions

Upload this form and any additional documentation so that we can move forward in the quickest and most secure way.



TRADITIONAL CONTRIBUTION AND INVESTMENT SELECTION

PART 1. IRA OWNER

PART 2. IRA TRUSTEE OR CUSTODIAN

To be completed by the IRA trustee or custodian

Name (First/MI/Last)	_			
Social Security Number				
Date of Birth Phone	 Name Address Line 1 Address Line 2 			
Email Address				
Account Number Suffix				
Security Code			Drganization Number_	
PART 3. CONTRIBUTION INFORMATION				
Contribution Amount Contribution D	ate	_		
 CONTRIBUTION TYPE (Select one) Regular (Includes catch-up contributions) Contribution for Tax Year Rollover (Distribution from a Traditional IRA, SIMPLE IRA, or eligible Traditional IRA) By selecting this transaction, I irrevocably designate this contribution Transfer (Direct movement of assets from a Traditional IRA or SIMPL Recharacterization (A nontaxable movement of a Roth IRA contribution SEP Contribution (Contribution made under a simplified employee p contribution is made) IF YOU ARE REQUIRED TO TAKE A REQUIRED MINIMUM DISTRING (Checking any of the following will require adjusting your required mining This is a rollover or transfer of assets removed last year. Date of Rem This is a transfer from my deceased spouse's IRA on December 3 	a as a rollover. E IRA into this Tradition ion into this Traditiona a as a recharacterization ension (SEP) plan; SEP BUTION THIS YEAR, hum distribution.) ovalassets were removed f	nal IRA) I IRA) n. contributions are rep COMPLETE THE FC	ported for the year in w DLLOWING IF APPLIC ear after death.	hich the
PART 4. INVESTMENT AND DEPOSIT INFORMATION	,			
INVESTMENT INFORMATION (Complete this section as applicable.)				
Quantity Investment Description or Amount	Status (new or existing)	Investment Number	Term or Maturity Date	Interest Rate
Investment Description or Amount DEPOSIT METHOD	(new or existing)	Number nization made payab ng, savings, IRA) s may apply.)	or Maturity Date	Rate
Investment Description or Amount DEPOSIT METHOD	(new or existing)	Number nization made payab ng, savings, IRA) rs may apply.) Routing Numbe	or Maturity Date	Rate
Investment Description or Amount DEPOSIT METHOD	(new or existing)	Number nization made payab ng, savings, IRA) s may apply.) Routing Numbe ng, savings, IRA)	or Maturity Date	Rate
Investment Description or Amount DEPOSIT METHOD	(new or existing)	Number nization made payab ng, savings, IRA) s may apply.) Routing Numbe ng, savings, IRA)	or Maturity Date	Rate

I certify that all of the information provided by me is accurate and may be relied upon by the trustee or custodian. I certify that the contribution described above is eligible to be contributed to the IRA and I authorize the deposit to be invested in the manner described above.

X Signature of IRA Owner

RULES AND CONDITIONS APPLICABLE TO TRADITIONAL IRA CONTRIBUTIONS

The IRA contribution rules are often complex. The general rules are listed below. If you have any questions regarding a contribution, please consult with a competent tax professional or refer to IRS Publication 590-A, *Contributions to Individual Retirement Arrangements (IRAs)*, for more information. This publication is available on the IRS website at www.irs.gov or by calling 1-800-TAX-FORM.

REGULAR

The total amount you may contribute to a Traditional IRA for any tax year cannot exceed the lesser of the published annual limit or 100 percent of your earned income and other eligible compensation. If you also maintain a Roth IRA, the maximum contribution to your Traditional IRA is reduced by any contributions you make to your Roth IRA.

- You may make a contribution for the prior year up until your tax filing deadline for that year, not including extensions. Designating a contribution for the prior year is irrevocable.
- If you are age 50 or older by the end of the year, you may be eligible to make an additional catch-up contribution to an IRA for that tax year.

ROLLOVER

A rollover is a distribution and a subsequent tax-free movement of assets from any of your Traditional IRAs, SIMPLE IRAs, or eligible employersponsored retirement plans to your Traditional IRA.

- You are permitted to roll over only one distribution from an IRA (Traditional, Roth, or SIMPLE) in a 12-month period, regardless of the number of IRAs you own. There is no limit to the number of rollovers you may perform from any of your eligible employer-sponsored retirement plans to a Traditional IRA.
- Any required minimum distributions paid to an IRA owner or beneficiary may not be rolled over.
- A rollover generally must be completed within 60 days from the date you receive the assets.
- A rollover contribution of Roth IRA assets may not be made to a Traditional IRA.
- A rollover contribution of assets distributed from a SIMPLE IRA within two years of the first contribution to your SIMPLE IRA may not be made to a Traditional IRA.

TRANSFER

A transfer is a direct movement of assets to your Traditional IRA from any of your other Traditional IRAs or SIMPLE IRAs.

- You may perform an unlimited number of transfers.
- A transfer contribution may not be made from a Roth IRA.
- A transfer contribution may not be made from a SIMPLE IRA within two years of the first contribution to your SIMPLE IRA.

RECHARACTERIZATION

A recharacterization is the procedure to treat all or a portion of a contribution to a Roth IRA as if it had been made to a Traditional IRA.

- A contribution that is recharacterized must be adjusted for earnings.
- The recharacterization deadline is your tax filing deadline for the year of the original transaction, including extensions.

SEP CONTRIBUTION

If you are a participant in your employer's simplified employee pension (SEP) plan, contributions may be made to your Traditional IRA.

- Your employer may make SEP contributions to your Traditional IRA within the published annual limits.
- If your employer maintains a salary deferral SEP plan, your elective deferrals may not exceed the published annual limit.
- If your employer maintains a salary deferral SEP plan and you are age 50 or older by the end of the calendar year, you may be eligible to make additional catch-up salary deferral contributions.
- SEP contributions to your Traditional IRA are reported for the year in which the contributions are made.

RMD REQUIREMENT

If you were born before July 1, 1949, you are required to take an RMD by April 1 of the year following the year you attain age 70½ and every year thereafter. If you were born on or after July 1, 1949, you are required to take an RMD by April 1 of the year following the year you attain age 72 and every year thereafter.