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Automatic Contribution Form

Traditional | Roth

PTC IRA Account Number

Preferred Trust Company as Custodian accepts automatic cash contributions to an IRA account. There is no fee associated with automatic contribution transactions. Funds are deducted from a checking or savings account. The financial institution must be a member of the Automated Clearing House (ACH). Deductions will be processed on or business day following the 5th and/or the 20th of each month. The minimum automatic contribution is \$25.00 and the maximum is dependent on the allowable maximum amount in accordance with IRS rules and regulations of Publication 590 for the current year as defined at www.irs.gov. Preferred Trust Company as Custodian reserves the right to cancel an automatic contribution should the ACH deduction be rejected due to insufficient funds or incorrect account information.

SECTION 1 | IRA Account Owner Information

First Name Last Name Last 4 Digits of SSN DOB (MM/DD/YY)

Daytime Phone Number Email Address

SECTION 2 | Deduction Information

REPORTING

Indicate tax year this contribution is attributable, if not intended for current year. Is this contribution a gift? Yes No

FREQUENCY

Monthly on the **5th** Monthly on the **20th** Twice Monthly on the **5th** and **20th** Annual Contribution

DEDUCTION

Deduction Amount (minimum \$25.00) \$

BANK INFORMATION | Preferred Trust Company recommends sending a copy of a **VOIDED** check for Automatic Contributions to be setup for verification purposes. Notify Preferred Trust Company if the bank information changes. An ACH that is rejected will be assessed a **\$30.00** ACH Automatic Contribution Rejection Fee.

Banking Institution Name

Name on Account **Account Type** Checking Savings

Bank Account Number Routing Number

SECTION 3 | Acknowledgement

I authorize Preferred Trust Company as Custodian to deduct the above stated amount from my bank account on the withdrawal date(s) specified on this form. This authority will remain in effect until I submit written notice of change or termination.

Signature of IRA Account Owner Date

INTERNAL USE ONLY

Verified
(Initials and Date)