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# Contribution Form

PTC IRA Account Number

Preferred Trust Company as Custodian accepts 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 as designated for a one-time contribution or recurring contribution on the 5th and/or the 20th of each month or the business day prior. 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

### ONE-TIME CONTRIBUTION

Deduction Amount (minimum \$25.00) \$

### RECURRING CONTRIBUTION

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

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)