



BOTH INDIVIDUAL RETIREMENT ACCOUNT APPLICATION

PART 1. BOTH IRA-OWNER

Name (First/Last) _____
 Address Line 1 _____
 Address Line 2 _____
 City/State/ZIP _____
 Social Security Number _____
 Date of Birth _____ Phone _____
 Email Address _____
 Account Number _____

PART 2. BOTH IRA TRUSTEE

To be completed by the Both IRA Trustee

Name _____
 Address Line 1 _____
 Address Line 2 _____
 City/State/ZIP _____
 Phone _____ Organization Number _____

- ☐ This is an amendment to an existing Both IRA.
☐ The Both IRA trustee manager responsibilities described in the Trustee Management Agreement section of this agreement.

PART 3. CONTRIBUTION INFORMATION

Contribution Amount _____ Contribution Date _____

CONTRIBUTION TYPE (check one)

- ☐ **Regular** (includes catch-up contributions)
 Contribution for Tax Year _____
- ☐ **Refund** (distribution from a Both IRA or employer-sponsored retirement plan that is being deposited into this Both IRA)
 By selecting this transaction, I immediately designate this contribution as a refund.
- ☐ **Transfer** (direct movement of assets from a Both IRA into this Both IRA)
- ☐ **Recharacterization** (a nontaxable movement of a Traditional IRA contribution into this Both IRA)
 By selecting this transaction, I immediately designate this contribution as a recharacterization.
- ☐ **Conversion** (a taxable movement from a Traditional (non-Roth) IRA into this Both IRA)
 By selecting this transaction, I immediately designate this contribution as a conversion.

PART 4. INVESTMENT AND DEPOSIT INFORMATION

INVESTMENT INFORMATION (Complete the section as applicable)

Investment Description	Quantity or Amount	Investment Number	Type or Allocation	Interest Rate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

DEPOSIT METHOD

- ☐ **External Check** (If the contribution type is transfer, the check must be for the full amount (net of any fees) to the trustee for this Both IRA.)
- ☐ **Internal Account**
 Account Number _____ Type (e.g., checking, savings, IR) _____
- ☐ **External Account (e.g., EFT, ACH, etc.)**
 Name of Organization Sending the Funds _____ Routing Number (optional) _____
 Account Number _____ Type (e.g., checking, savings, IR) _____
- Deposit Frequency _____