ROTH IRA

CONTRIBUTION AND INVESTMENT SELECTION

PART 1. ROTH IRA OWNER

Name (First/MI/Last) _____

Social Security Number _____

Date of Birth _____ Phone _____

Email Address _____

Account Number _____ Suffix _____

PART 2. ROTH IRA TRUSTEE OR CUSTODIAN

To be completed by the Roth IRA trustee or custodian

Name _____

Address Line 1 _____

Address Line 2 _____

City/State/ZIP _____

Phone _____ Organization Number _____

PART 3. CONTRIBUTION INFORMATION

Contribution Amount _____ Contribution Date _____

CONTRIBUTION TYPE (Select one)

☐ 1. **Regular** (Includes catch-up contributions)
Contribution for Tax Year _____

☐ 2. **Rollover** (Distribution from a Roth IRA or eligible employer-sponsored retirement plan like a being deposited into this Roth IRA)
By selecting this transaction, I irrevocably designate this contribution as a rollover.

☐ 3. **Transfer** (Direct movement of assets from a Roth IRA into this Roth IRA)

☐ 4. **Recharacterization** (A reversible movement of a Traditional IRA contribution into this Roth IRA)
By selecting this transaction, I irrevocably designate this contribution as a recharacterization.

☐ 5. **Conversion** (A taxable movement from a Traditional IRA or SIMPLE IRA into this Roth IRA)
By selecting this transaction, I irrevocably designate this contribution as a conversion.

PART 4. INVESTMENT AND DEPOSIT INFORMATION

INVESTMENT INFORMATION (Complete this section as applicable.)

Investment Description	Quantity of Principal	Status (new or existing)	Investment Number	Term or Maturity Date	Interest Rate

DEPOSIT METHOD

☐ **Cash or Check** (If the contribution type is 1 and/or 2, the check must be from a financial organization made payable to the trustee for this Roth IRA.)

☐ **Internal Account**
Account Number _____ Type (e.g., checking, savings, IRA) _____

☐ **External Account** (e.g., ITT, ACH, wire)
Name of Organization Sending the Assets _____ Routing Number (optional) _____
Account Number _____ Type (e.g., checking, savings, IRA) _____
Deposit Taken by _____

PART 5. SIGNATURE

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 Roth IRA and I authorize the deposit/investment in the manner described above.

X _____ _____
Signature of Roth IRA Owner Date (mm/dd/yyyy)