

IRA Contribution Instructions

Form Purpose	Use this form to document a tax-year contribution to your IRA account.
Assistance	<p>Please email iraservices@fortisbankus.com</p> <p>We are available 9:00 a.m. to 5:00 p.m. MT, Monday through Friday.</p>
Instructions	<p><i>A Deposit Slip: IRA Contribution</i> and a deposit of funds are required to record an IRA contribution.</p> <p>Funds may be deposited by check, ACH, or wire.</p> <p>Include the deposit slip with a mailed check.</p> <p>Send the deposit slip using the delivery instructions below if funds are deposited by ACH or wire.</p>
Fees	<p>The following fees may apply to this transaction:</p> <p>\$15.00 Inbound wire fee.</p> <p>Fees will be debited from the IRA.</p> <p>You may choose to add \$15.00 to your contribution account if funds are deposited by wire.</p> <p>Please refer to the current Fortis Bank IRA Custodial Fee Schedule for details.</p>
Timelines	Funds are typically available within 1 business day of receipt of both cash and the deposit slip.
Important Notes	<p>Please consult with a competent tax, legal, or investment advisor to determine if you are eligible to contribute to an IRA, how much you can contribute, and whether your contribution may be tax deductible.</p> <p>All IRA contributions must be made in cash.</p> <p>For IRA LLC and IRA Trust plans offering checkbook control:</p> <p>Never make an IRA contribution directly to the LLC/Trust checking account. The contribution must occur through the IRA account.</p> <p>If your account has been established with auto-funding (default), Fortis Bank will automatically invest newly contributed cash into the LLC or Trust.</p> <p>If your account requires manual entity funding – such as if the IRA holds more than one LLC/Trust – you will need to submit a <i>Buy Direction</i> form instructing Fortis Bank to invest cash from the IRA to the entity.</p>

Delivery Instructions

Secure Upload:	Regular Mail:	Overnight Mail:	Fax:
https://fortisbankus.com/secure-upload	Fortis Bank Attn: Funding PO Box 217270 Salt Lake City, UT 84171	Fortis Bank Attn: Funding 6975 Union Park Ave.	720-616-4030

Helpful to Know. Use this form to document a tax-year contribution to your IRA account. Contributions should be made to a single account for a specific tax year.

This deposit slip must accompany a contribution so that we may properly record the transaction.

Please consult with a competent advisor for tax and legal advice related to your eligibility to contribute to an IRA and applicable contribution limits based on your specific situation.

1: Account Owner	Full Name					
	Email Address				Daytime Phone	
2: Contribution Details	Fortis Account Number	IRA Type				
		Traditional	Roth	SEP	SIMPLE Employee	SIMPLE Employer
	Contribution Amount			Tax Year		
3: Delivery Method	Wire			Check to Fortis Bank		
	Date Sent			Date Sent		
	Issuing Bank			Check Number		
	Wire to:			Make check payable to:		
	Bank: Fortis Bank			Fortis Bank FBO {Account Owner} {IRA Type}		
	Address: 6975 Union Park Avenue Suite 180 Midvale, UT 84047			i.e. Fortis Bank FBO John Public Roth IRA		
	Routing/ABA: 107006428			Put Account# in memo field.		
	Credit Account: 1010054813			Send to regular mail or overnight address listed below.		
Account Name: Fortis Bank						
Further Credit/Memo: FBO {Client Name &Account #}						

Mail this form and checks to		Send this form electronically if funds are sent by wire/ACH	
Regular Mail:	Overnight Mail:	Secure Upload:	Fax:
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