

Add Funds to Your Checkbook IRA LLC/Trust Account



These instructions are intended to help you with funding your new checking account once your Self-Directed IRA (“SDIRA”) is established and funded with the appropriate custodian. You may also wish to contact your SDIRA plan provider or other qualified counsel for assistance.

Delivery Instructions

- Funds may be deposited into your account via ACH, check, or wire.
- Funds must be initiated from the custodian of your SDIRA.
- Checks may be mailed directly to Fortis Bank from the custodian of your SDIRA.
 - The check must be made payable to the **name of your Checkbook IRA LLC/Trust**, not to you personally.

Wire/ACH Refer to your Account Agreement for daily Wire and ACH limits.	Bank Name and Address:	Fortis Bank 6975 Union Park Avenue, Suite 180 Midvale, UT 84047
	Routing/ABA:	107006428
	Account Number:	Your Checkbook IRA LLC/Trust Account Number
	Account Name:	Name of your Checkbook IRA LLC/Trust
Check	Make Payable To:	Entity Name i.e. ABC Investments LLC/Trust
Mailing Address	Mail To:	Fortis Bank Attn: Funding 6975 Union Park Avenue, Suite 180 Midvale, UT 84047





Consult with a Tax Professional

Please contact your plan provider or competent tax, legal, or investment counsel if you have questions about the proper execution and tax considerations of funding your new Checkbook IRA LLC/Trust Checking Account.

Fortis Bank does not provide tax, legal, or investment advice.

