

Depositing Contributions to your Solo 401(k)



Your Solo 401(k) can be funded via contribution. As the trustee for your Solo 401(k), it is your responsibility to execute the rollover transaction.

These instructions are intended to help you with the contribution deposit process. You may also wish to contact your plan provider or other qualified counsel for assistance.

Delivery Instructions

- Solo 401(k) contributions may be deposited via ACH, check, or wire.
- The check must be made payable to the **name of your Solo 401(k) Plan**, not to you personally.
- Check Delivery Instructions:
 - **Option 1** | Mail directly to Fortis Bank.
 - **Option 2 – if applicable** | Mail to your address and deposit it to your Fortis Bank account via mobile deposit.

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 Solo 401(k) Account Number
	Account Name:	Name of your Solo 401(k) Plan
Check	Make Payable To:	Entity Name i.e. ACME Ventures 401(k) Deposits may also be made via mobile deposit
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 an intended Solo 401(k) contribution.

Fortis Bank is a passive custodian and does not provide tax, legal, or investment advice.