

IRA Contribution Deposit Slip Instructions

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| Form Purpose | Use this form to document a tax-year contribution to your IRA account. |
| Assistance | Please email iraservices@fortisbankus.com . We are available 9:00 a.m. to 5:00 p.m. MT, Monday through Friday. |
| Instructions | The <i>IRA Contribution Deposit Slip</i> and a deposit of funds are required to record an IRA contribution. <ul style="list-style-type: none"> Funds may be deposited by wire, check, or ACH. Include the deposit slip with a mailed check. Send the deposit slip using the delivery instructions below. |
| Fees | Please refer to the current Fortis Bank Self-Directed Retirement Product Fee Schedule for details. |
| Timelines | Funds are typically available within 1 business day of receipt of both cash and the deposit slip. Please refer to the Funds Availability Disclosure for additional information. |
| Important Notes | Please consult with a 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. All IRA contributions must be made in cash. For IRA LLC and IRA Trust plans offering checkbook control: <ul style="list-style-type: none"> IRA contributions <u>must not be made directly</u> to the LLC/Trust checking account. The contribution must occur through the IRA account. If your account has been established with auto-funding (default), Fortis Bank will automatically invest newly contributed cash into the LLC or Trust. If your account requires manual entity funding – such as if the IRA holds more than one LLC/Trust – you will need to submit a Buy Direction form instructing Fortis Bank to invest cash from the IRA to the entity. |

Delivery Instructions

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| Secure Upload: https://fortisbankus.com/secure-upload | Regular Mail: Fortis Bank Attn: Funding PO Box 217270 Salt Lake City, UT 84171 | Overnight Mail: Fortis Bank Attn: Funding 6975 Union Park Ave. Suite 180 Midvale, UT 84047 | Fax: 720-616-4030 |
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FORTIS BANK

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

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| Mail this form and checks to | | Send this form electronically if funds are sent by wire/ACH | |
| Regular Mail: | Overnight Mail: | Secure Upload: | Fax: |
| Fortis Bank Attn: Funding PO Box 217270 Salt Lake City, UT 84171 | Fortis Bank Attn: Funding 6975 Union Park Ave. Suite 180 Midvale, UT 84047 | https://fortisbankus.com/secure-upload | 720-616-4030 |

