



GENERAL GUIDELINES

A coupon must be provided with all contributions, rollovers or deposits remitted by check or wire.

ALTERNATIVE CONTRIBUTION METHOD:

- **ACH DEPOSITS:**
Allows you to make automatic contributions and deposits from your checking or savings account.

SUBMISSION OPTIONS

OVERNIGHT:

ETC Brokerage Services
1 Equity Way
Westlake, OH 44145

REGULAR MAIL:

ETC Brokerage Services
P. O. Box 451340
Westlake, OH 44145

BY FAX:

440-365-1447

BY E-MAIL:

ETCBrokerage@ETCBrokerage.com

CONTACT INFORMATION

PHYSICAL ADDRESS:

ETC Brokerage
1 Equity Way
Westlake, OH 44145

TOLL FREE:

(877) 819-8918

E-MAIL:

ETCBrokerage@ETCBrokerage.com

CHECK INSTRUCTIONS

- MAKE CHECKS PAYABLE TO:
ETC Brokerage Custodian FBO "Account Owner's Name".

John Smith 1001 Lake Blvd Cleveland, OH 44145	DATE: 05/01/15	CHK # 00 0000 0000
PAY TO ETC Brokerage Custodian FBO "Account Owner's Name" \$3,000		
Three Thousand and _____		00/100
MEMO Acct # 123456789		<i>John Smith</i>

- Please include the Account Number on the memo line of the check.

WIRING INSTRUCTIONS

- Please complete the **CONTRIBUTION, ROLLOVER and DEPOSIT COUPON** on the following page and **SUBMIT PRIOR TO THE WIRE BEING SENT**. Wires received without prior notification may cause delays in processing.

Wiring Funds to ETC Brokerage:

- **Wire to:** BMO Harris Bank NA
ABA Number: 071000288
Account Number: 2470177
- **For Credit to:** ETC Brokerage
- **For Further Credit:** Account Owner's Name
Account Number

DO NOT FAX OR MAIL THIS COVER PAGE

INVESTMENT PRODUCTS: NOT FDIC INSURED - NO BANK GUARANTEE - MAY LOSE VALUE



CONTRIBUTION, ROLLOVER and DEPOSIT COUPON

Please DO NOT staple or tape coupon to the check

ACCOUNT REGISTRATION	
ACCOUNT NUMBER	DEPOSIT AMOUNT
ADVISOR/REPRESENTATIVE	
CHECK NUMBER	WIRE TRANSFER DATE

Make Checks Payable To: ETC Brokerage Custodian FBO "Account Owner's Name". Please include the Account Number on the memo line of the check.

P. O. BOX 451340 • WESTLAKE, OH 44145 • PHONE: 877-819-8918 • FAX: 440-365-1447 • EMAIL: ETCBROKERAGE@ETCBROKERAGE.COM

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ETCB 01, REV 12/2023



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Contribution, Rollover or Deposit Designation

- IRA Contribution For Tax Year _____
- Roth Contribution For Tax Year _____
- IRA Rollover SIMPLE
- Deposit to Taxable Account HSA
- Fee Reimbursement/Payment SEP

Account Type

- Traditional IRA Roth IRA HSA
- SEP SIMPLE
- Taxable Account (type)_____

Contribution, Rollover or Deposit Designation

- IRA Contribution For Tax Year _____
- Roth Contribution For Tax Year _____
- IRA Rollover SIMPLE
- Deposit to Taxable Account HSA
- Fee Reimbursement/Payment SEP

Account Type

- Traditional IRA Roth IRA HSA
- SEP SIMPLE
- Taxable Account (type)_____

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