



## GENERAL GUIDELINES

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

### ACH DEPOSIT/ CONTRIBUTION METHOD:

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

**Note:** ACH Deposits, Contributions and Rollovers are limited to \$50,000 or less. If your amount exceeds \$50,000 please remit by Wire.

## SUBMISSION OPTIONS

### OVERNIGHT:

ETC Brokerage Services  
1 Equity Way  
Westlake, OH 44145

### BY FAX:

440-365-1447

### BY E-MAIL:

ETCBrokerage@ETCBrokerage.com

### REGULAR MAIL:

ETC Brokerage Services  
P. O. Box 88156  
Milwaukee, WI  
53288-8156

## 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](mailto:ETCBROKERAGE@ETCBROKERAGE.COM)

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ETCB 01, REV 02/2024



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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)\_\_\_\_\_

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