



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 \$100,000 or less. If your amount exceeds \$100,000 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 *John Smith*

- Please include the Account Number on the memo line of the check.
- Mail Checks to: ETC Brokerage
P.O. Box 88156
Milwaukee, WI 53288-8156

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.

Mail Checks To: ETC Brokerage, P.O. Box 88156, Milwaukee, WI 53288-8156

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

Account Type

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