

GENERAL GUIDELINES

A coupon must be provided with all contributions, rollovers or deposits remitted by check, ACH, or wire. Please see specific instructions for each.

SUBMISSION OPTIONS

OVERNIGHT:

ETC Brokerage Services
1 Equity Way
Westlake, OH 44145

REGULAR MAIL:

ETC Brokerage Services
BIN #010156
P. O. Box 88156
Milwaukee, WI 53288-8156

BY FAX:

440-365-1447

BY EMAIL:

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: 05/01/25	CHK # 00 0000 0000
PAY TO: ETC Brokerage Custodian FBO "Account Owner's Name"	\$ 3,000	
Three Thousand and _____	00/100	
MEMO: Acct # 12345678	<i>John Smith</i>	

Please include the Account Number on the memo line of the check. **COMPLETE CONTRIBUTION/DEPOSIT COUPON AND INCLUDE WITH CHECK.**

MAIL CHECKS AND

COUPON TO: ETC BROKERAGE

BIN #010156

P.O. BOX 88156

MILWAUKEE, WI 53288-8156

CONTACT INFORMATION

PHYSICAL ADDRESS:

ETC Brokerage Services
1 Equity Way
Westlake, OH 44145

TOLL FREE:

(877) 819-8918

BY EMAIL:

ETCBrokerage@ETCBrokerage.com

ACH AND WIRE 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. Coupon can be submitted via fax or email.

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.

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 COUPONS

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, BIN # 010156, P.O. Box 88156, Milwaukee, WI 53288-8156

CONTRIBUTION, ROLLOVER OR DEPOSIT DESIGNATION	
<input type="checkbox"/> IRA Contribution	For Tax Year _____
<input type="checkbox"/> Roth Contribution	For Tax Year _____
<input type="checkbox"/> IRA Rollover	<input type="checkbox"/> SIMPLE
<input type="checkbox"/> Deposit to Taxable Account	<input type="checkbox"/> HSA
<input type="checkbox"/> Fee Reimbursement/Payment	<input type="checkbox"/> SEP
ACCOUNT TYPE	
<input type="checkbox"/> Tradition IRA	<input type="checkbox"/> Roth IRA <input type="checkbox"/> HSA
<input type="checkbox"/> SEP	<input type="checkbox"/> SIMPLE <input type="checkbox"/> CESA
<input type="checkbox"/> Taxable Account(type) _____	



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<input type="checkbox"/> Roth Contribution	For Tax Year _____
<input type="checkbox"/> IRA Rollover	<input type="checkbox"/> SIMPLE
<input type="checkbox"/> Deposit to Taxable Account	<input type="checkbox"/> HSA
<input type="checkbox"/> Fee Reimbursement/Payment	<input type="checkbox"/> SEP
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