

## GENERAL GUIDELINES

The following coupon must be remitted with all contributions, rollovers, deposits, or investment payments in the form of a check or wire. Please see specific institutions for each.

- Please include a separate **Funding Coupon** for each check, ACH, or wire. (NOTE: PLEASE FAX FUNDING COUPON PRIOR TO ACH OR WIRE TRANSFER)
- Do not include any investment instructions on the **Funding Coupon**.

## 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

## CONTACT INFORMATION

For assistance, please contact a Representative at:

### Phone:

877-819-8918

### Fax:

440-365-1447

### Or e-mail questions to:

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

## ACH AND WIRE INSTRUCTIONS

Please complete the **Funding Coupon** on the following page and **SUBMIT PRIOR TO THE ACH OR WIRE BEING SENT**. Wires received without prior notification may cause delays in processing. Coupon can be submitted via fax or email.

The incoming wire fee will automatically be deducted from the account.

### WIRING FUNDS TO ETC BROKERAGE SERVICES:

- 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

**Note:** ACH Deposits, Contributions, and Rollovers are limited to \$100,000 or less. If your amount exceeds \$100,000 please remit by Wire.

**DO NOT FAX OR MAIL THIS COVER PAGE**  
**INVESTMENT PRODUCTS: NOT FDIC INSURED - NO BANK GUARANTEE - MAY LOSE VALUE**

DO NOT staple or tape coupon to the check. Make Checks Payable To: ETC Brokerage, Custodian FBO "Account Owner's Name, Account Number." If funds are being wired, please fax this Funding Coupon prior to the wire transfer.

ACCOUNT REGISTRATION	ACCOUNT NUMBER	DEPOSIT AMOUNT
DESIGNATED REPRESENTATIVE	EXPECTED WIRE DATE	CHECK NUMBER

  

<b>INVESTMENT DEPOSIT TYPE</b>			
Investment Name: _____			
<input type="checkbox"/> Principal	<input type="checkbox"/> Dividend	<input type="checkbox"/> Settlement	<input type="checkbox"/> Oil & Gas Income
<input type="checkbox"/> Interest	<input type="checkbox"/> Return of Capital	<input type="checkbox"/> Redemption	<input type="checkbox"/> Other _____
<input type="checkbox"/> Rental Income	<input type="checkbox"/> Refund	<input type="checkbox"/> Sale of Asset	

**\*\*For Note/Debt Payments, provide the Principal and Interest breakdown.**

INTEREST \$	PRINCIPAL \$	OTHER \$
NEW ENDING BALANCE ON THE NOTE/DEBT \$		

**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

**P. O. BOX 451249 • WESTLAKE, OH 44145 • PHONE: 877-819-8918 • FAX: 440-365-1447 • EMAIL: ETCBROKERAGE@ETCBROKERAGE.COM**

**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 Contribution
<input type="checkbox"/> Deposit to Taxable Account	<input type="checkbox"/> SEP Contribution
<input type="checkbox"/> Fee Reimbursement/Payment	<input type="checkbox"/> HSA Contribution

**ACCOUNT TYPE**

<input type="checkbox"/> Tradition IRA	<input type="checkbox"/> SEP	<input type="checkbox"/> HSA
<input type="checkbox"/> Roth	<input type="checkbox"/> SIMPLE	
<input type="checkbox"/> Taxable Account(type) _____		

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