



GENERAL GUIDELINES

The following coupon must be remitted with all investment payments in the form of a check or wire.

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

SUBMISSION OPTIONS

OVERNIGHT:

Equity Trust Company
1 Equity Way
Westlake, OH 44145

REGULAR MAIL:

Equity Trust Company
Attn: Innovayte Operations
P. O. BOX 451249
Westlake, OH 44145

BY FAX:

440-365-1447

BY EMAIL:

operations@innovayte.com

CONTACT INFORMATION

For assistance, please contact a Client Service Specialist at:

BY PHONE:

877-819-8918

BY EMAIL:

operations@innovayte.com

CHECK INSTRUCTIONS

MAKE CHECKS PAYABLE TO:

Equity Trust Company Custodian FBO "Account Owner's Name".

John Smith 1001 Lake Blvd Cleveland, OH 44145	DATE: 05/01/25	CHK # 00 0000 0000
PAY TO <u>Equity Trust Company Custodian FBO "Account Owner's Name"</u>	\$ 3,000	
Three Thousand and _____	00/100	
MEMO <u>Acct # D0123456789</u>	<i>John Smith</i>	

Please include the Equity Trust Company account number on the memo line of the check.

ACH AND WIRE INSTRUCTIONS

- Please complete the **Investment Coupon** on the following page and **SUBMIT PRIOR TO THE WIRE BEING SENT**. Wires received without prior notification may cause delays in processing.
- The incoming wire fee will automatically be deducted from the account.

WIRING FUNDS TO EQUITY TRUST COMPANY:

- Wire to: Citibank
ABA Number: 321171184
Account Number: 205575210
- For Credit to: Equity Trust Company
- 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



INVESTMENT COUPON

DO NOT staple or tape coupon to the check. If funds are being wired, please fax this Investment Coupon prior to the wire transfer.

ACCOUNT REGISTRATION	
ACCOUNT NUMBER	DEPOSIT AMOUNT
INVESTMENT NAME	
CHECK NUMBER	WIRE TRANSFER DATE

DEPOSIT TYPE	
<input type="checkbox"/> Principal	<input type="checkbox"/> Return of Capital
<input type="checkbox"/> Interest	<input type="checkbox"/> Refund
<input type="checkbox"/> Rental Income	<input type="checkbox"/> Settlement
<input type="checkbox"/> Dividend	<input type="checkbox"/> Redemption
<input type="checkbox"/> Oil & Gas Income	
<input type="checkbox"/> Other _____	

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

Interest \$	Principal \$	Other \$
New Ending Balance on the Note/Debt \$		

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

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