



CONTRIBUTION, ROLLOVER AND DEPOSIT COUPON

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:

Equity Trust Company
Attn: Innovayte Operations
1 Equity Way
Westlake, OH 44145

BY FAX:

440-365-1447

REGULAR MAIL:

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

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 mail.

ACH DEPOSIT/ CONTRIBUTION METHOD:

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

WIRING FUNDS TO EQUITY TRUST COMPANY:

- Wire to: BMO Harris Bank
ABA Number: 071000288
Account Number: 1719640
- For Credit to: Equity Trust Company
- For Further Credit: Account Owner's Name
Account Number

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 Equity Trust Company 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: EQUITY TRUST COMPANY
ATTN: INNOVAYTE OPERATIONS
P. O. BOX 451249
WESTLAKE, OH 44145

OVERNIGHT

DELIVERY: EQUITY TRUST COMPANY
ATTN: INNOVAYTE OPERATIONS
1 EQUITY WAY
WESTLAKE, OH 44145

CONTACT INFORMATION

PHYSICAL ADDRESS:

Equity Trust Company
1 Equity Way
Westlake, OH 44145

TOLL FREE:

(877) 819-8918

DO NOT FAX OR MAIL THIS COVER PAGE
INVESTMENT PRODUCTS: NOT FDIC INSURED - NOT BANK GUARANTEED - 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: Equity Trust Company Custodian FBO "Account Owner's Name." Please include the Account Number on the memo line of the check.

Mail Checks To: Equity Trust Company, P. O. BOX 451249 , Westlake, OH 44145
Overnight Delivery: Equity Trust Company, 1 Equity Way, Westlake, OH 44145

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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