



A Division of Equity Trust Company

# Qualified Plan Funding/Delivery Instructions

(Sterling Trust is Non-ACAT eligible)



## WIRING INSTRUCTIONS

### WIRE FUNDS TO:

- **Wire to:** Citibank  
451 Montgomery Street  
San Francisco, CA 94104  
ABA: 321171184
- **For Credit to:** Equity Trust Company  
Account #: 204007413
- **For Further Credit:** Account Holder's Name, QP Account Number

### PLEASE NOTE:

- Sterling Trust must be informed prior to wire being sent.
- An incoming wire fee (as shown on Fee Schedule) will automatically be deducted from the account.
- Please complete the **Qualified Retirement Plan Contribution Coupon** below and fax prior to wire being sent.



## CHECK INSTRUCTIONS

- **MAKE CHECKS PAYABLE TO:**  
Equity Trust Company, Custodian FBO "Account Holder's Name, QP Account Number"
- **SEND CHECK ALONG WITH DEPOSIT COUPON TO:**  
Equity Trust Company, Custodian FBO: Account Holder's Name, QP Account Number

**Mailing Address:** Sterling Trust  
P. O. Box 2526  
Waco, TX 76702-2526

**Overnight:** Sterling Trust  
1101 Wooded Acres  
Suite 120  
Waco, TX 76710



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## QUALIFIED RETIREMENT PLAN CONTRIBUTION COUPON

For use by qualified plan accounts administered by Equity Plan Administrative Services ONLY. If Equity Administrative Services is not your plan administrator, use the Rollover/Contribution Coupon.

Account Owner Name \_\_\_\_\_

| Participant/Employee Contribution  |                          |                      |           |
|--|--------------------------|----------------------|-----------|
| Contribution Type  | Employee Account Number: | Contribution Amount: | Tax Year: |
| <input type="checkbox"/> Tax-Deferred<br><input type="checkbox"/> After-Tax (Roth)               |                          |                      |           |
| Employer Contribution  |                          |                      |           |
| Contribution Type:   | Employee Account Number: | Contribution Amount: | Tax Year: |
| <input type="checkbox"/> Employer Match<br><input type="checkbox"/> Discretionary Profit Sharing |                          |                      |           |

Please be sure this coupon is sent to: Sterling Trust, P.O.Box 2526, Waco, TX 76702-2526  
PHONE: (800) 955-3434, EXT. 5395, FAX: (254) 772-9752, EMAIL: QPSERVICES@STERLINGTRUSTCOMPANY.COM