



Sterling Trust

DEPOSIT COUPON



GENERAL GUIDELINES

The following coupon must be remitted with all contribution and rollover deposits in the form of a check or wire.

- Do not include any investment instructions on the **Deposit Coupon**.
- Please include a separate **Deposit Coupon** for each check or wire.
- Additional **Deposit Coupons** can be obtained 24 hours a day, 7 days a week by visiting the Online forms section of our website, www.SterlingTrustCompany.com.



CHECK INSTRUCTIONS

- MAKE CHECKS PAYABLE TO:
Equity Trust Company, d.b.a. Sterling Trust Custodian FBO "Account Holder's Name" IRA.
- Please include the Sterling Account Number on the memo line of the check.



WIRING INSTRUCTIONS

- Please complete the **Deposit 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.
- If you wish to pay the wire fee by credit card, please contact your Client Services Representative for further assistance. (*Fee must be paid prior to funds being wired. No reimbursements will be made if fee is deducted from the account.*)

Wiring Funds to Sterling Trust:

- **Wire to:** United Western Bank
Denver, CO 80202
ABA: 102089534
- **For Credit to:** Equity Trust Company, d.b.a. Sterling Trust
Account #: 5037001509
- **For Further Credit:** Account Holder's Name, IRA Account Number



SUBMISSION OPTIONS

BY FAX
254-751-0872

OVERNIGHT
Sterling Trust
7901 Fish Pond Road
Waco, TX 76710

REGULAR MAIL
Sterling Trust
P.O. Box 2526
Waco, TX 76702-2526

BY E-MAIL
IRAServices@SterlingTrustCompany.com



CONTACT INFORMATION

For assistance, please contact a Client Services Representative at:

Phone:
800-955-3434 (Option 2)
254-751-1505 (Option 2)

Fax:
254-751-0872

Website:
www.SterlingTrustCompany.com

Or e-mail questions to:
IRAServices@SterlingTrustCompany.com

DO NOT FAX OR MAIL THIS COVER PAGE



P. O. Box 2526, Waco, TX 76702-2526
 PHONE: 800-955-3434 (option 2), 254-751-1505 (option 2)
 FAX: 254-751-0872 / E-MAIL: IRAServices@SterlingTrustCompany.com

DEPOSIT COUPON

Please complete all applicable information on the **Deposit Coupon** and submit along with the check. Please **DO NOT** staple or tape coupon to the check. If funds are being wired, please fax this **Deposit Coupon** to the attention of "Bank Desk" prior to the wire transfer.

Account Holder Name	
Account Number	Deposit Amount
Check Number	Wire Transfer Date
Investment Name	

Deposit Type	
<input type="checkbox"/>	Note/Debt Payment**
<input type="checkbox"/>	Rental Income
<input type="checkbox"/>	Dividend
<input type="checkbox"/>	Return of Capital
<input type="checkbox"/>	Sales Proceeds (Partial Sale)
<input type="checkbox"/>	Sales Proceeds (Complete Sale)

<input type="checkbox"/>	Contribution For Tax Year _____
<input type="checkbox"/>	Rollover For Tax Year _____
<i>SEP Contributions are reported in the year received.</i>	

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

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

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