STERLING TRUST®

A Division of Equity Trust Company

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 Coupo***n 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, 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 Service 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:** Citibank
  451 Montgomery Street, San Francisco, CA 94104
  ABA: 321171184
- **For Credit to:** Equity Trust Company
  Account #: 204007397
- **For Further Credit:** Account Holder's Name, IRA Account Number

SUBMISSION OPTIONS

BY FAX
254-751-0872

OVERNIGHT
Sterling Trust
1101 Wooded Acres
Suite 120
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 Service 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

Reset Form

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	
Email Address		

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

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

Deposit Type

- ☐ Note/Debt Payment**
- ☐ Rental Income
- ☐ Dividend
- ☐ Return of Capital
- ☐ Sales Proceeds (Partial Sale)
- ☐ Sales Proceeds (Complete Sale)

- ☐ Contribution For Tax Year ____________
- ☐ Rollover For Tax Year ____________

SEP Contributions are reported in the year received.

Make Checks Payable To: Equity Trust Company, Custodian FBO *"Account Holder's Name, Account Number"* .

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Account Number | Deposit Amount | Check Number
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