



# Sterling Trust

## Funding/Delivery Instructions (Sterling Trust is Non-ACAT eligible)



### WIRING INSTRUCTIONS

#### WIRE FUNDS TO:

- **Wire to:** United Western Bank  
Denver, CO 80202  
ABA: 102089534  
Phone: (720) 956-6500
- **For Credit to:** Equity Trust Company, d.b.a. Sterling Trust  
Account #: 5037001509
- **For Further Credit:** Account Holder's Name, IRA Account Number

#### PLEASE NOTE:

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



### CHECK INSTRUCTIONS

- **MAKE CHECKS PAYABLE TO:**  
Equity Trust Company, d.b.a. Sterling Trust Custodian FBO "Account Holder's Name, Account Number"
  - **SEND CHECK ALONG WITH DEPOSIT COUPON TO:**  
Equity Trust Company, d.b.a. Sterling Trust  
FBO: Account Holder's Name, Account Number  
**Mailing Address:** P. O. Box 2526  
Waco, TX 76702-2526
- Overnight:** 7901 Fish Pond Road  
Waco, TX 76710



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's Name	
Account Number	Deposit Amount
Check Number	Wire Transfer Date
Investment Name	

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

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

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 _____	

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