

Deposit Coupon Instructions

Form Use

Use this form when making a cash contribution to your IRA Resources account or when depositing income from an asset.

If you need assistance in completing the form, please call us at:
888-322-6534 option 1

Fees and Processing

Deposit processing fee: \$0

If deposit is by wire: \$30

IRAR processing time: One day

Submission Options



Email

forms@iraresources.com



Fax

858-459-6565



Mail

IRA Resources, Inc.
1000 Broadway, Suite 350
Oakland, CA 94607

Instructions

- Select the relevant option, Contribution or Deposit From Asset. Use one form per account.
- All deposits must be in the name of your IRA: **IRAR Trust FBO (Your Name, Account #)**
- If you are depositing funds via wire or ACH, you must initiate the transaction with your bank. Your bank will not allow us to initiate a wire or ACH on your behalf. We need the information from your bank to allocate the funds to your account once the funds are received.
- Funds sent via check may be subject to a 5 day hold. Wire deposits are available the next business day.
- Use the section "Reference/Special Instructions" in section 2 to send us additional information regarding your deposit. For example: if the funds are to be allocated to multiple assets, please provide the breakdown.

IMPORTANT

Your deposit will be made once we have received the funds and the deposit coupon information to allocate funds.

You must have enough funds in your account to cover any transaction fees applicable. Lack of funds will delay your deposit.



IRA RESOURCES, INC.

QUESTIONS? 888-322-6534
SUBMIT FORM: forms@iraresources.com

858-459-6565 fax

Deposit Coupon

1. ACCOUNT OWNER INFORMATION

Form section for account owner information including fields for Full Name, Account Number, Account Type, Email Address, and Daytime Phone Number.

2. DEPOSIT INFORMATION

2.1 Reason For Deposit (check one of two options and complete the appropriate section)

Form section for Reason For Deposit with checkboxes for Contribution and Income From Asset, and associated fields for amounts and asset details.

2.2 Deposit Method (this is how the funds will arrive at IRAR, check one option and complete the appropriate section)

Form section for Deposit Method with checkboxes for Check to IRAR Trust, Wire, and ACH, and fields for delivery instructions and sender information.

2.3 Deposit Frequency [] One-Time [] Monthly [] Quarterly [] Annually [] Other: _____

Additional Instructions:

3. PAYMENT OF IRAR FEES

How Will You Pay for Transaction Fees?

If credit card is declined, fees will be debited from IRA. Your transaction will NOT be processed unless fees are paid.

Form section for payment of IRAR fees including checkboxes for Debit IRAR Account and Credit Card, and fields for credit card type, name, number, expiration date, security code, and billing address.

4. ACCOUNT OWNER SIGNATURE AND DEPOSIT ACKNOWLEDGEMENT

Form section for account owner signature and deposit acknowledgement with fields for Signature and Date.