

IRA Contribution Designation Form

TO MAKE A CONTRIBUTION, PLEASE COMPLETE THIS FORM AND INCLUDE YOUR CHECK. Make checks payable to **PENSCO Trust Company, LLC, FBO (your name), IRA.** (Want to make a contribution via ACH? See our [ACH For Contributions](#) form, available at pensco.com/forms.)

1. Account Owner Information

Account Owner Name (first, mi, last)

Account No.

Date

\$

Amount Enclosed

2. Contribution Instructions

Credit my contribution as follows:

\$ _____ Traditional IRA For tax year _____

\$ _____ Traditional IRA For tax year _____

\$ _____ Roth IRA For tax year _____

\$ _____ Roth IRA For tax year _____

\$ _____ Rollover (must complete Rollover Certification below)

\$ _____ SEP IRA (contributions are reported in the year received, according to IRS regulations)

\$ _____ Other: _____

3. IRA Rollover Certification (required if you are making a rollover contribution)

I hereby certify that this is a valid rollover Contribution that meets all IRS requirements. I have not executed another rollover from any other IRA, including Traditional, SEP, Roth or SIMPLE IRA accounts in the past 12 months. I hereby irrevocably authorize the deposit of the rollover contribution and understand that I am fully responsible for the tax consequences of this transaction.



Account Owner Signature

Date

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

Upload forms to:
www.pensco.com/upload

Send mail to:
PENSCO
P.O. Box 173859
Denver, CO 80217-3859

For express deliveries:
PENSCO
1560 Broadway, Suite 400
Denver, CO 80202-3331

Questions?
Call 800-962-4238
clients@pensco.com