



IRA CONTRIBUTION

For making contributions to IRA accounts with Solera National Bank as custodian

Instructions: Fill out each section completely, then read and sign the acknowledgement to certify the contribution. Please retain a copy of this document for your personal records.

SECTION 1 ACCOUNT INFORMATION

Solera IRA Account Number: _____ IRA Type: _____

Account Owner Name: _____

SECTION 2 CONTRIBUTION DETAILS

Contribution Amount: \$ _____ Contribution Tax Year: _____

Incoming Delivery Method: Check Wire Transfer

Sending Institution/Individual Name: _____

Contribution Funds are: Included with this form Arriving separately from this form

Important: All funds *must* be made payable to “Solera National Bank as custodian for/for benefit of (FBO) [CUSTOMER NAME], [IRA TYPE & #].” We *cannot* accept any funds addressed directly to the customer without listing Solera National Bank as the custodian.

SECTION 3 DISCLOSURE AND AUTHORIZATION

I verify that this is a contribution to the listed IRA for the specified year (*required*).

By signing below, I certify that the information on this form is true and correct to the best of my knowledge, and that Solera National Bank may rely on what I have provided. I accept all responsibilities regarding this contribution, including eligibility requirements and contribution limits. I have been advised to consult a competent advisor for legal and tax advice and have not been provided any such advice from Solera National Bank. I agree to indemnify and hold harmless Solera National Bank from any consequences related to this contribution.

Account Owner Name

Account Owner Signature

Date

