



CUSTODIAL IRA DELIVERY INSTRUCTIONS

Solera National Bank
iratransfers@solerabank.com

(303) 937-6426

SECTION 1 MAILED CHECK INSTRUCTIONS

Checks must be made payable as follows:

Solera National Bank custodian for _____, _____, _____
[customer name] [IRA account type*] [IRA account number]

Example: Solera National Bank custodian for Jane Doe, Roth IRA 01234

* IRA account types: Traditional IRA,
Roth IRA, SEP IRA

Mail checks to:

Solera National Bank
Attn: IRA Transfers
P.O. Box 876
Cedar City, UT 84720

SECTION 2 DOMESTIC WIRE INSTRUCTIONS

The initial receiving account for the transfer is the Solera National Bank credit account. The final beneficiary must be referenced in the memo as follows:

For Further Credit to: Solera National Bank custodian for [customer name],
[IRA account type*], [IRA account number]

Domestic Transfer Information:

Beneficiary Bank Name: Solera National Bank
Beneficiary Bank Address: 319 S Sheridan Blvd, Lakewood, CO 80226
Beneficiary Bank Routing/ABA #: 1070-0728-1
To Credit Account: 20500000
For Further Credit/Reference: Solera National Bank custodian for [customer name],
[IRA account type*], [IRA account number]

SECTION 3 INTERNATIONAL WIRE INSTRUCTIONS

The initial receiving account for the transfer is the Solera National Bank credit account. The final beneficiary must be referenced in the memo as follows:

For Further Credit to: Solera National Bank custodian for [customer name],
[IRA account type*], [IRA account number]

International Transfer Information:

Receiving Institution Name: Bankers' Bank of the West
Receiving Institution Routing/ABA#: 1020-0374-3 **Bank Identifier Code (BIC):** INSTUS5D
Receiving Institution Address: 1099 18th Street, Suite 2700 Denver, CO 80202
Beneficiary Bank Name: Solera National Bank
To Credit Account: 20500000
For Further Credit/Reference: Solera National Bank custodian for [customer name],
[IRA account type*], [IRA account number]