

# Contribution Authorization

## STEP 1. PARTICIPANT INFORMATION

First Name	Middle Initial	Last Name	Account Number
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## STEP 2. RETIREMENT PLAN TYPE

- Traditional IRA
  Roth IRA
  SEP IRA
  SIMPLE IRA
  Education Savings Account
  Special Needs Apply

**USE THE ROTH CONVERSION/  
RECHARACTERIZATION REQUEST FORM  
FOR INTERNAL ROTH CONVERSIONS.**

## STEP 3. CONTRIBUTION TYPE

### Cash Contributions

In keeping with Internal Revenue Service (IRS) tax reporting requirements, all SEP and SIMPLE IRA contributions (including employee salary deferrals) must be reported in the year in which they actually occur, regardless of the year of designation. For additional information, refer to the filing instructions for IRS Form 5498.

	CURRENT YEAR	PRIOR YEAR	TOTAL DEPOSIT
IRA Contribution	\$	\$	\$
Education Savings Account	\$	\$	\$
Employer Contribution (SEP IRA)	\$	\$	\$
Employer Matching Contribution (SIMPLE IRA)	\$	\$	\$
Employer Nonelective Contribution (SIMPLE IRA)	\$	\$	\$
Employee Salary Deferral Contribution (SIMPLE IRA, SARSEP)	\$	\$	\$
Roth Conversion – Cash (from previous Traditional IRA account)	\$		\$
Rollover – Cash (see Certification section below)	\$		\$
<b>Total</b> (the amount of your check should equal this amount)	<b>\$</b>	<b>\$</b>	<b>\$</b>

### Securities Rollover/Conversion

- Rollover of securities (for like IRA registration types or employer-sponsored plan distributions to an IRA)

Description	Quantity
Description	Quantity
Description	Quantity

- Securities conversion to Roth IRA (from previous Traditional IRA account)

Description	Quantity
Description	Quantity
Description	Quantity



IRA102CTRB



## **Hewitt Financial Services Retirement Account Deposit Requirements**

### **Acceptable Methods of Deposit:**

#### **Electronic draft**

1. Complete IRA Contribution Form
2. Complete ACH Authorization Agreement
3. Attach a voided bank check or savings deposit slip

#### **Check**

1. Complete IRA Contribution Form
2. Make check payable to Pershing LLC *fbo Customer Name*

### **Unacceptable Forms of Deposit**

- Checks with double endorsement (third party checks)
- Cash, money orders, traveler's checks, starter or bill pay checks
- Checks made payable to cash
- Bank checks (non-personal) under \$10,000
- Checks drawn on foreign banks
- Checks drawn in a currency other than US dollars
- Checks drawn against lines of credit (i.e. Discover, Visa, AMEX, MasterCard credit advances or home equity loans)