

\_\_\_\_\_ Traditional    \_\_\_\_\_ Roth

## **CONTRIBUTION DESIGNATION STATEMENT**

\_\_\_\_\_ Credit Union Name

### **MEMBER INFORMATION**

\_\_\_\_\_ Member's Name

\_\_\_\_\_ Social Security Number

\_\_\_\_\_ Birth Date

\_\_\_\_\_ Street Address

\_\_\_\_\_ City

\_\_\_\_\_ State

\_\_\_\_\_ Zip

\_\_\_\_\_ Home Phone Number

\_\_\_\_\_ Business Phone Number

\_\_\_\_\_ IRA Account Number

### **CONTRIBUTION INFORMATION**

Amount of Deposit \$ \_\_\_\_\_

Date of Deposit \_\_\_\_\_

Contributions can be made to your Traditional or Roth IRA for a year at any time during the year or by the due date for filing your federal income tax return, not including extensions. If an amount is contributed to your Traditional or Roth IRA between January 1 and April 15 (or the tax-filing deadline), please indicate which year the contribution is for.

#### **Tax Year:**

\_\_\_\_\_ Current Year    or    \_\_\_\_\_ Prior Year

### **SIGNATURES**

I verify that the information provided by me on this form is true and accurate and may be relied upon by the Credit Union. I further verify that the contribution is eligible to be contributed and that I assume full responsibility for this transaction. The Credit Union has not provided any legal or tax advice to me.

\_\_\_\_\_ Signature of Member

\_\_\_\_\_ Date

\_\_\_\_\_ Authorized Signature of Custodian

\_\_\_\_\_ Date