TRADITIONAL INVESTMENT SELECTION

PART 1. IRA OWNER		PART 2. IRA TRUSTEE OR CUSTODIAN			
			To be comp	leted by the IRA trustee	e or custodiai
Name (First/MI/Last)		Name			
Social Security Number		Address Line 1 Address Line 2			
Date of Birth Phone Email Address					
PART 3. CONTRIBUTION INFORMATION					
Contribution Amount	Contribution Da	te			
 CONTRIBUTION TYPE (Select one) 1. Regular (Includes catch-up contributions) Contribution for Tax Year 2. Rollover (Distribution from a Traditional IRA, SIN Traditional IRA) By selecting this transaction, I irrevocably designs 3. Transfer (Direct movement of assets from a Traditional IRA) By selecting this transaction, I irrevocably designs 3. Transfer (Direct movement of assets from a Traditional IRA) By selecting this transaction, I irrevocably designs 5. SEP Contribution (A nontaxable movement of plan rollover to a Roth IRA into this Traditional IR By selecting this transaction, I irrevocably designs 5. SEP Contribution (Contribution made under a sin contribution is made) IF YOU ARE 70½ OR OLDER THIS YEAR, COMPI (Checking any of the following will require adjusting yo This is a rollover or transfer of assets removed last This is a transfer from my deceased spouse's Tradit The value of my portion of my deceased spouse's IF This is a recharacterization of a 2017 conversion or 	ate this contribution ditional IRA or SIMF a Roth IRA contribu- tate this contribution mplified employee p LETE THE FOLLO our required minimu year. Date of Remo- tional IRA and the a RA on December 3:	n as a rollover. PLE IRA into this Traditi ition, a 2017 conversio n as a recharacterizatio pension (SEP) plan; SEF WING IF APPLICAE Im distribution.) oval ssets were removed fr L of last year	ional IRA) on, or a 2017 eligible on. P contributions are re BLE 	employer-sponsored re eported for the year in t	etirement
PART 4. INVESTMENT AND DEPOSIT INFO	ORMATION				
INVESTMENT INFORMATION (Complete this sectio	on as applicable.) Quantity or Amount	Status (new or existing)	Investment Number	Term or Maturity Date	Interest Rate
DEPOSIT METHOD Cash or Check (If the contribution type is transfer, a Internal Account Account Number External Account (e.g., EFT, ACH, wire) (Additional Name of Organization Sending the Assets Account Number	documentation m	Type (e.g., checki ay be required and fee	ng, savings, IRA) s may apply.) Routing Numbe	e to the trustee for this r (Optional)	
		Deposi	it Taken by		

PART 5. SIGNATURE

I certify that all of the information provided by me is accurate and may be relied upon by the trustee or custodian. I certify that the contribution described above is eligible to be contributed to the IRA and I authorize the deposit to be invested in the manner described above.

RULES AND CONDITIONS APPLICABLE TO TRADITIONAL IRA CONTRIBUTIONS

The IRA contribution rules are often complex. The general rules are listed below. If you have any questions regarding a contribution, please consult with a competent tax professional or refer to IRS Publication 590-A, *Contributions to Individual Retirement Arrangements (IRAs),* for more information. This publication is available on the IRS website at www.irs.gov or by calling 1-800-TAX-FORM.

REGULAR

The total amount you may contribute to a Traditional IRA for any tax year cannot exceed the lesser of the published annual limit or 100 percent of your earned income and other eligible compensation. If you also maintain a Roth IRA, the maximum contribution to your Traditional IRA is reduced by any contributions you make to your Roth IRA.

- You may make a contribution for the prior year up until your tax filing deadline for that year, not including extensions. Designating a contribution for the prior year is irrevocable.
- If you are age 50 or older by the end of the year, you may be eligible to make an additional catch-up contribution to an IRA for that tax year.

ROLLOVER

A rollover is a distribution and a subsequent tax-free movement of assets from any of your Traditional IRAs, SIMPLE IRAs, or eligible employersponsored retirement plans to your Traditional IRA.

- You are permitted to roll over only one distribution from an IRA (Traditional, Roth, or SIMPLE) in a 12-month period, regardless of the number of IRAs you own. There is no limit to the number of rollovers you may perform from any of your eligible employer-sponsored retirement plans to a Traditional IRA.
- Any required minimum distributions paid to an IRA owner or beneficiary may not be rolled over.
- A rollover generally must be completed within 60 days from the date you receive the assets.
- A rollover contribution of Roth IRA assets may not be made to a Traditional IRA.
- A rollover contribution of assets distributed from a SIMPLE IRA within two years of the first contribution to your SIMPLE IRA may not be made to a Traditional IRA.

TRANSFER

A transfer is a direct movement of assets to your Traditional IRA from any of your other Traditional IRAs or SIMPLE IRAs.

- You may perform an unlimited number of transfers.
- A transfer contribution may not be made from a Roth IRA.
- A transfer contribution may not be made from a SIMPLE IRA within two years of the first contribution to your SIMPLE IRA.

RECHARACTERIZATION

A recharacterization is the procedure to treat all or a portion of a contribution, conversion, or eligible employer-sponsored retirement plan rollover to a Roth IRA as if it had been made to a Traditional IRA.

- A contribution, conversion, or eligible employer-sponsored retirement plan rollover that is recharacterized must be adjusted for earnings.
- The recharacterization deadline is your tax filing deadline for the year of the original transaction, including extensions.
- Any conversion or eligible employer-sponsored retirement plan rollover to a Roth IRA occurring in tax years beginning on or after January 1, 2018, cannot be recharacterized.

SEP CONTRIBUTION

If you are a participant in your employer's simplified employee pension (SEP) plan, contributions may be made to your Traditional IRA.

- Your employer may make SEP contributions to your Traditional IRA within the published annual limits.
- If your employer maintains a salary deferral SEP plan, your elective deferrals may not exceed the published annual limit.
- If your employer maintains a salary deferral SEP plan and you are age 50 or older by the end of the calendar year, you may be eligible to make additional catch-up salary deferral contributions.
- SEP contributions to your Traditional IRA are reported for the year in which the contributions are made.