

Account #:  
 Portfolio #:  
 Banker Initials:

## IRA APPLICATION/INFORMATION FORM

### Type of Customer

Existing Customer (update CIP/create CDD)                      New Customer (*CIP required*)

### Type of Activity

Initial Contribution              Transfer              Change in CD term with added funds              New CD for existing customer

### IRA Holder Information

Name			
Address		City	State      Zip
Social Security Number		Date of Birth	Email
DL State	DL #	DL Issued	DL Expires
Home Phone Number		Cell Phone Number	
Employer		Occupation	Employer Phone Number
Employer Address		City	State      Zip

### Beneficiary Information

#### Beneficiary 1 (To be completed for NEW IRA PLAN only)

Name			
Address		City	State      Zip
Social Security Number		Date of Birth	Cell Phone Number
Relationship to IRA holder		Beneficiary Type:	Shares:

#### Beneficiary 2 (To be completed for NEW IRA PLAN only)

Name			
Address		City	State      Zip
Social Security Number		Date of Birth	Cell Phone Number
Relationship to IRA holder		Beneficiary Type:	Shares:

#### Beneficiary 3 (To be completed for NEW IRA PLAN only)

Name			
Address		City	State      Zip
Social Security Number		Date of Birth	Cell Phone Number
Relationship to IRA holder		Beneficiary Type:	Shares:

**Beneficiary 4 (To be completed for NEW IRA PLAN only)**

Name			
Address		City	State Zip
Social Security Number	Date of Birth	Cell Phone Number	
Relationship to IRA holder		Beneficiary Type:	Shares:

**Type of IRA**

Traditional                      ROTH

**Contribution Type**

Regular/Spousal	Transfer	Rollover	Recharacterization
ROTH Conversion (from Traditional IRA)		Roth Conversion (from SIMPLE IRA)	

<b>Contribution Amount:</b> Contribution limits for 2025: \$7,000 and if age 50 or over: an additional catch-up of \$1,000 Contribution limits for 2026: \$7,500 and if age 50 or over: an additional catch-up of \$1,100
<b>Contribution Date:</b>
<b>Contribution for tax year (for Regular/Spousal &amp; catch-up contributions ONLY)</b>

**Signature(s)**

IRA Holder Signature	Date
Employee Signature	Date