



IRA Contribution Designation Form

NOTE: To make a contribution, please complete this form and include your check. Make checks payable to Pacific Premier Trust, FBO (your name), IRA. (Want to make a contribution via ACH? See our ACH For Contributions form, available at PacificPremierTrust.com/forms.)

1. ACCOUNT OWNER INFORMATION

NAME (FIRST, MI, LAST)*		PACIFIC PREMIER TRUST ACCOUNT NO.
AMOUNT ENCLOSED* \$	DATE*	PRIMARY PHONE*

2. IRA CONTRIBUTION LIMITS

TAXABLE YEAR	CONTRIBUTION LIMIT	CATCH UP LIMIT FOR AGE 50+
2023	\$6,500	\$1,000
2024	\$7,000	\$1,000

3. CONTRIBUTION INSTRUCTIONS

Credit my contributions as follows:

\$ _____ Traditional IRA For Tax Year: _____

\$ _____ Traditional IRA For Tax Year: _____

\$ _____ Roth IRA For Tax Year: _____

\$ _____ Roth IRA For Tax Year: _____

\$ _____ Rollover (must complete Rollover Certification below)

\$ _____ SEP IRA (contributions are reported in the year received, according to IRS regulations)

\$ _____ Other: _____

4. IRA ROLLOVER CERTIFICATION (REQUIRED IF YOU ARE MAKING A ROLLOVER CONTRIBUTION)

I hereby certify that this is a valid rollover Contribution that meets all IRS requirements. I have not executed another rollover from any other IRA, including Traditional, SEP, Roth or SIMPLE IRA accounts in the past 12 months. I hereby irrevocably authorize the deposit of the rollover contribution and understand that I am fully responsible for the tax consequences of this transaction.

	ACCOUNT OWNER SIGNATURE*	DATE*
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NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.

Upload forms to:
[PacificPremierTrust.com/upload](https://www.pacificpremiertrust.com/upload)
Fax to: 303.614.7038

Send mail to:
Pacific Premier Trust
Processing Center
PO BOX 981012
Boston, MA 02298

For express deliveries:
FIS-Remittance Processing
Loading Dock #2
Attn: Pacific Premier Trust
10 Dan Road
Canton, MA 02021

Questions?
Call 800.962.4238

