



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

Form fields for account owner information: NAME (FIRST, MI, LAST)\*, PACIFIC PREMIER TRUST ACCOUNT NO., AMOUNT ENCLOSED\*, DATE\*, PRIMARY PHONE\*

2. IRA CONTRIBUTION LIMITS

Table with 3 columns: TAXABLE YEAR, CONTRIBUTION LIMIT, CATCH UP LIMIT FOR AGE 50+. Rows for 2023 and 2024.

3. CONTRIBUTION INSTRUCTIONS

Credit my contributions as follows:

Form for contribution instructions with lines for Traditional IRA, Roth IRA, Rollover, SEP IRA, and 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.

Form fields for rollover certification: ACCOUNT OWNER SIGNATURE\*, DATE\*

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

Fax to: 303.614.7038

Send mail to: Pacific Premier Trust Processing Center P.O. 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

