

# IRA Contribution Designation Form

**NOTE:** To make a contribution, please complete this form and include your check. Make checks payable to Columbia Private Trust, FBO (your name), IRA. (Want to make a contribution via ACH? See our ACH For Contributions form, available at [ColumbiaPrivateTrust.com/Forms](https://ColumbiaPrivateTrust.com/Forms).)

## 1. ACCOUNT OWNER INFORMATION

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

## 2. IRA CONTRIBUTION LIMITS

TAXABLE YEAR	CONTRIBUTION LIMIT	CATCH UP LIMIT FOR AGE 50+
2024	\$7,000	\$1,000
2025	\$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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**Upload forms to:**  
[ColumbiaPrivateTrust.com/Upload](https://ColumbiaPrivateTrust.com/Upload)  
**Fax to:** 303.614.7086

**Send mail to:**  
Columbia Private Trust  
Processing Center  
P.O. Box 981012  
Boston, MA 02298

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

**Questions?**  
Call 800.962.4238

