

Additional Investment Form (IRA)

Instructions:

This Additional Investment Form (IRA) is used to record information about Traditional, Roth, SEP, Inherited and SIMPLE IRA contributions. Complete this form and attach a check (made payable to SEI Private Trust Company ("SPTC"), include FBO [your account name] and account number) with a paper clip (please do not use staples). IRA owner's signature is required for the following contribution types: conversions and rollovers. Please refer to the Guide to Asset Management for processing guidelines.

Forward completed form to: SEI Private Trust Company Attention: Advisor Network (Service Team) P.O. Box 1098 Oaks, PA 19456-9907 OR Fax: 610-676-1021

1 Advisor Information

Advisor's Name

Advisor's Phone Number

2 IRA Owner Information

IRA Owner's Name

IRA Owner's Taxpayer Identification Number

IRA Owner's Date of Birth

3 Contribution Information

Total dollar amount: \$

Traditional/SEP IRA (select only one)

- Regular/Spousal Contribution Contribution for Tax Year:
Employer SEP Contribution
Direct Transfer Source: Traditional IRA SEP IRA SIMPLE IRA\*
Rollover Source: Traditional IRA SEP IRA SIMPLE IRA\* Employer-Sponsored Plan (e.g., 401(a), 401(k), 403(b), governmental 457(b))

\*You may not roll over or transfer SIMPLE IRA assets to a Traditional/SEP IRA until at least two years have elapsed from the time of your initial participation in your employer's SIMPLE IRA plan.

Roth IRA (select only one)

- Regular/Spousal Contribution Contribution for Tax Year:
Conversion Source: Traditional IRA SEP IRA SIMPLE IRA\*\*
Direct Transfer (Note: Select this option only if you are transferring assets from another Roth IRA)
Rollover Source: Roth IRA Designated Roth account under a 401(k) or 403(b) plan Employer-Sponsored Plan (e.g., 401(a), 401(k), 403(b), governmental 457(b))

\*\*You may not convert SIMPLE IRA assets to a Roth IRA until at least two years have elapsed from the time of your initial participation in your employer's SIMPLE IRA plan.

Inherited IRA: Inherited Traditional IRA Inherited Roth IRA

- Direct Transfer Source: Inherited IRA
Direct Rollover Source: Designated Roth account under a 401(k) or 403(b) plan Employer-Sponsored Plan (e.g., 401(a), 401(k), 403(b), governmental 457(b))

SIMPLE IRA (select only one)

- Direct Transfer Source: SIMPLE IRA
Rollover Source: SIMPLE IRA
Employer SIMPLE Contribution
Employee Deferral SIMPLE Contribution

