



If you are depositing cash, including for bill pay, or rolling over assets to Forge Trust Co., please complete and submit this form. Please make checks payable to "Forge Trust Co. FBO Client Name" and reference the account number on the memo line. If it is a rollover check and the check is made out to your name, please deposit it into your bank account and write a check payable to "Forge Trust Co. FBO Client Name" drawn against your bank account. If you are wiring funds, our wiring instructions form can be found under DELIVERY INFORMATION. Submit this form to us the same day that your wire is sent. Sending an ACH or direct deposit? Do not complete this form; please complete our DIRECT DEPOSIT (ACH) NOTIFICATION form. For bill pay, please refer to DELIVERY INFORMATION form.

1. PERSONAL INFORMATION (*required field)

Should Forge Trust Co. need to contact you in regards to this request, your preferred method of contact is: Email Primary Phone	First Name*	Middle Name	Last Name*
	Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
	Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. DEPOSIT INFORMATION (please complete this section to characterize the deposit you are making)

1. Transfer from another IRA	Do not use this form. Please complete a <i>TRANSFER AUTHORIZATION</i> form.		
2. Cash Contributions Complete this section if you are making a contribution to your IRA or 401(K) or if you are making a deposit to maintain your minimum balance requirement.	Select one:	Cash Contribution for TAX YEAR	Amount
	Traditional IRA or 401(K)		
	Roth IRA or 401(K)	Cash Contribution for TAX YEAR	Amount
Coverdell ESA	NOTE: The minimum cash balance must comprise of qualified funds.		
SEP			
SIMPLE (select one)	Employer	Employee	
3. Cash Rollover from another IRA Complete this section if you are rolling over cash from another IRA.	Rollover of a distribution from another IRA contributed to your Forge Trust Co. account within 60 days of receipt of such funds.		Amount
You must select one of the following: This is a rollover from a TRAD, SEP or SIMPLE IRA going into my Forge Trust Co. TRAD, SEP or SIMPLE IRA This is a rollover from a TRAD, SEP or SIMPLE IRA going into my Forge Trust Co. ROTH IRA as a conversion This is a rollover from a ROTH IRA going into my Forge Trust Co. ROTH IRA			
4. Cash Rollover from a Qualified Retirement Plan Complete this section if you are rolling over cash from a qualified retirement plan (QRP).	Rollover of a lump sum distribution or plan termination distribution paid to you within one taxable year from a qualified employee benefit plan or annuity, contributed to your Forge Trust Co. account within 60 days of receipt of such funds.		Amount
	Plan Type/Name (i.e. 401K, 403b, 457b, etc.)		
	You must select one of the following: This is a rollover from a qualified retirement plan going into my Forge Trust Co. TRAD, SEP, or SIMPLE IRA, solo 401K This is a rollover from a qualified retirement plan going into my Forge Trust Co. ROTH IRA as a conversion This is a rollover from a ROTH 401K (or similar plan) going into my Forge Trust Co. ROTH IRA, Roth solo 401K		
5. In-Kind Rollover Contribution of an Investment Asset from a Prior IRA or Qualified Retirement Plan (QRP) If this section is completed, please return this form by fax to (650) 745-2907 or email it to transfers-in@ForgeTrust.com.	Asset Name		Value
	Name of QRP/Prior Custodian		
	REQUIREMENT: Please attach a statement from the QRP/Prior Custodian listing the asset(s) you wish to rollover. If there is no statement available, please provide a letter signed by the trustee of the QRP/Prior Custodian confirming the assets were held in the QRP. You may only contribute asset(s) in-kind if you are rolling it over from a prior IRA or QRP within 60 days of distribution from said IRA or plan. ROLLING OVER MULTIPLE ASSETS? Please attach a separate page listing the assets and their corresponding values, and write "SEE ATTACHED" at the top of this form.		

