

Contact Center: (800) 248-8447 | www.ForgeTrust.com

There are several ways to get cash into your Forge Trust self-directed IRA, and we have a dedicated team available to help you along the way.

1. TRANSFER FROM AN EXISTING IRA OF THE SAME TYPE

Effortlessly transition your existing IRA—Traditional, Roth, SEP, or SIMPLE—into your new IRA, of the same type.

Complete and submit our [Transfer Request - Cash Only - DocuSign](#) form, along with the most recent account statement for the account you are transferring from. We will work directly with your existing institution to complete your request.

Transfer requests in good order will be sent to your financial institution within 2-3 business days, at which point the funding of your account depends on the financial institution and payment method selected.

2. ROLLOVER FROM A QUALIFIED RETIREMENT PLAN e.g. 401(k), 403(b), or Pension Plan

This is also known as a “Direct Rollover”.

Contact your current plan administrator to request a rollover from your existing plan to your Forge Trust IRA. Instruct them to issue payment directly to Forge Trust for your benefit.

1. Direct them to make the check payable to:
2. **Forge Trust Co. [FBO: Client Name and Account Number].**
3. Follow the delivery instructions on our [Deposit Notification- PDF](#).
4. Complete and submit the form to Deposits@ForgeTrust.com.

Timing for this is entirely dependent on your current administrator, but funds will be deposited to your Forge Trust account within 1-2 days of receipt, provided all the necessary information is available.

3. CONTRIBUTE CASH TO THE IRA

Send cash from your personal bank account into your Forge IRA.

Refer to our [Deposit Notification- DocuSign](#) for instructions on how to send a contribution, either electronically via ACH, wire or by mailing a check. Complete and submit this form at the same time you initiate your payment to ensure the contribution is correctly deposited to your account.

Contributions are reported to the IRS and subject to annual limits based on type of IRA, age, and income. The IRS sets these limits, and they are subject to change from year to year.

Funds will typically be deposited into your account within 1-2 days of receipt.

Need Additional Support?

If you have questions, or need other funding options such as an indirect rollover, asset transfer, or Roth conversion, please visit our [forms page](#) or reach out to our team directly.

Contact us at:

Email: welcome@forgetrust.com

Phone: (800) 248-8447

Website: www.ForgeTrust.com