

Section One: Participant Information

Name	Member Number
Contact Number	Social Security Number

Section Two: Contributions

Note: If no Contribution Year is indicated below your contribution will be reported as a current year contribution, as required by the IRS.
 * Please make check payable to SchoolsFirst FCU, include your account number and tax year of the contribution on the memo section of your check.

2020 Combined Traditional and Roth IRA Contribution Limits
 IRA contribution limit: \$6,000.00 with an additional \$ 1,000 for age 50 and over for a total of \$ 7,000.
 Coverdell ESA limit: \$ 2,000

Contribution Year _____ Dollar Amount _____

- Traditional IRA
- Roth IRA
- Coverdell Education Savings Account

Section Three: Participant Signature

The contribution limit information is based on federal law as stated in the Internal Revenue Code. However, eligibility to contribute is dependent on your tax filing status and personal situation. Please consult a competent tax advisor concerning your specific contribution eligibility, and any applicable state laws which may differ from federal law. I instruct SchoolsFirst FCU to deposit the funds into my IRA/ ESA according to the contribution form. I understand that the deposit of funds into the account may have important and possibly irrevocable tax consequences. I acknowledge that SchoolsFirst does not provide tax advice that the account is self-directed and I assume full responsibility for this transaction. I release and agree to indemnify and hold harmless SchoolsFirst FCU from liability for any adverse consequences that may result from this transaction.

By signing below, I certify that the information and instructions provided, and the elections made by and through this IRA/ESA contribution instruction are true and correct. SchoolsFirst FCU may justifiably rely upon the instructions and elections made herein and is authorized to deposit the funds in the manner provided by this IRA contribution form.

 Participant Signature Date

Section Four: Witnessed and Accepted by SchoolsFirst FCU as Agent for Custodian By:

SchoolsFirst FCU Representative Name	SchoolsFirst FCU Representative Signature	Date	Representative User ID

472-IRA/ESA-Cont
 060413