A contribution made to a Roth IRA between January 1 and the tax return due date (usually April 15) can be treated either as a contribution for the current year or as a contribution for the preceding year.

We are required to report to the IRS how you want to treat each contribution made during this time period.

Please tell us the tax year to which your contribution applies by completing and signing this form.

Do not complete this form for direct transfers, rollover contributions, recharacterizations or conversions from traditional IRAs.

CONTRIBUTION AMOUNT AND TAX YEAR

$ ___________________________________________________________________________
Amount of Contribution

____________________________________________________________________________
Tax Year to Which Contribution Applies (YYYY)

IRA OWNER’S SIGNATURE

____________________________________________________________________________
IRA Owner’s Signature

____________________________________________________________________________
Date (MM/DD/YYYY)

For Credit Union Use Only

____________________________________________________________________________
Name of Credit Union Employee Who Took Deposit

____________________________________________________________________________
Date of Deposit (MM/DD/YYYY)