TRADITIONAL IRA CONTRIBUTION DIRECTION (FORM 2315)

Please Print or Type

____ ____ ____ ____ ____
CUID **(Credit union will complete.)**

____ ____ ____ - ____ ____ - ____ ____ ____ ____ - ____ ____
Social Security Number IRA Suffix

_____
Credit Union Name

_____
IRA Owner's Name (First, Initial, Last)

_____
Account Number

GENERAL INFORMATION

We report all traditional IRA contributions as regular contributions for the current year, unless we are instructed to report a contribution in a different manner. You can use this form to give us this instruction in two situations.

When you make a regular contribution between January 1 and your tax return deadline (usually April 15), you can instruct us to report the contribution as being attributed to the previous year. You can do this by completing the Regular Contribution section. After you give us this instruction, you cannot change back to having us report the contribution as being for the current year. It is not necessary to instruct us to report a regular contribution for the year in which it is made, since we do this automatically if we do not receive a contrary instruction.

You should tell us whenever you make a simplified employee pension (SEP) contribution so we can report it correctly. You can do this by completing the SEP Contribution section. We are required to report a SEP contribution in the year in which it is made, even if it is based on the earnings in a prior year.

You should complete a Traditional IRA Rollover and Transfer Contributions (Form 2314T) to instruct us that a contribution is a direct transfer or rollover from another traditional IRA or a direct rollover or rollover from a traditional qualified retirement plan.

You should complete an IRA Contribution Recharacterization (Form 2319) to instruct us that a contribution is a recharacterization of a contribution originally made to your Roth IRA.

REGULAR CONTRIBUTION

$_____
Amount of Contribution

_____
Tax Year to Which Contribution Applies (YYYY)

SEP CONTRIBUTION

$_____
Amount of Contribution

_____
Calendar Year Contribution was Made (YYYY)

IRA OWNER'S SIGNATURE

X _____
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)

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Stock # 80022
2315
(Rev. 12/2009)