

Additional contribution acknowledgment



Mail to: P.O. Box 9261, Des Moines, IA 50306-9261
Overnight: 8300 Mills Civic Pkwy, West Des Moines, IA 50266-3833
Phone: 1-866-747-3421 | **Email:** SecuritiesPi@sfgmembers.com

Instructions

I am using this form to:

- Establish/Change/Cancel** systematic contributions from my account at my financial institution into my Sammons Institutional Group®, Inc. (SIG) account – complete Sections 1, 2, and 4.
- Apply** a one-time personal or rollover contribution to my account – complete Sections 1, 3, and 4.

1. Account information

Please provide all requested information.

Account number

Account Holder's name (first, middle initial, last)

Social Security number

Street address

Apartment/Suite number

City

State

ZIP

Phone number

2. Systematic contribution information

I would like to:

- Establish** periodic payments into my account listed above via Automated Clearing House (ACH) payments from my checking/savings account listed below — complete the remainder of this section and sign the form.
- Change** the existing systematic contribution information — complete the remainder of this section and sign this form.
- Cancel** the existing systematic contributions — check here and sign this form.
- Add** my bank information so it is on file for future contributions. I do not wish to have funds drafted at this time.

Systematic contribution authorization

I authorize SIG to automatically withdraw periodic payments from my account listed below and credit these periodic payments to my account.

Please complete the financial institution information below. This authorization will remain in effect until SIG and the financial institution have each received written notification of its termination in such time and in such manner as to afford SIG and the financial institution a reasonable opportunity to act on the request.

Name(s) on account (first, middle initial, last)

Type of account: Checking Savings

Financial institution name

Financial institution phone number

Routing number (ABA #)

Account number

Please debit (payment amount): \$ _____ (minimum of \$100 required) Starting* (mm/dd/yyyy): _____

Please withdraw in the following frequency: Monthly Quarterly Semi-Annually Annually

* Please select a day of the month between the 1st and the 28th. If the date is not complete or an invalid date is chosen, the form will be considered "Not in Good Order." If the elected start date has already passed, the first payment will be processed one modal frequency from the elected start date. If the elected date is not a business day, the payment will be processed on the next available business day.

NOT FDIC/NCUA INSURED, MAY LOSE VALUE INCLUDING LOSS OF PRINCIPAL, NO BANK/ CU GUARANTEE, NOT A DEPOSIT, NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY.

3. One-time contribution information

All personal contributions for a previous tax year must be postmarked by April 15th. Please include the account number in the memo section of your check.

Send this completed form with check payable to: UMB Bank NA FBO: (Account Holder's name)

Regular/First class mail
Sammons Retirement Solutions
P.O. Box 9261
Des Moines, IA 50306-9261

Overnight mail
Sammons Retirement Solutions
8300 Mills Civic Pkwy
West Des Moines, IA 50266-3833

Contribution type (please select one):

Personal contribution

- **If you are under 50 years of age at the end of the 2023/2024 tax year:** The maximum contribution you can make to a Traditional or Roth IRA is the lesser of \$7,000 (\$6,500 for 2023) or the amount of your taxable compensation for 2023/2024. This limit can be split between a Traditional and a Roth IRA, but the combined limit is \$7,000 (\$6,500 for 2023). The maximum contribution to a Roth IRA and the maximum deductible contribution to a Traditional IRA may be reduced depending upon your Modified Adjusted Gross Income (Modified AGI).
- **If you are 50 years of age or older before the end of the 2023/2024 tax year:** The maximum contribution that can be made to a Traditional or Roth IRA is the lesser of \$8,000 (\$7,500 for 2023) or the amount of your taxable compensation for 2023/2024. This limit can be split between a Traditional and a Roth IRA, but the combined limit is \$8,000 (\$7,500 for 2023). The maximum contribution to a Roth IRA and the maximum deductible contribution to a Traditional IRA may be reduced depending upon your Modified Adjusted Gross Income (Modified AGI).
- **SEP IRA contributions:** The maximum contribution you can make is the lesser of: 1) 25% of compensation, or 2) \$69,000 (\$66,000 for 2023).
- SIG does not give tax, investment, or legal advice. Please consult with and rely upon your own tax, investment, and legal professional(s).

Contribution year and amount: Year* _____ Amount \$ _____ | Year* _____ Amount \$ _____

* If no tax year is indicated on your check or this form, it will be reported as a current tax year contribution.

Rollover contribution: 60-Day Rollover – Qualifying Rollover processed less than sixty (60) days ago. These funds are being deposited within the allowable 1 rollover per 12-month period.

Contribution amount (minimum of \$1,000 required): \$ _____ Account type: IRA Roth IRA* SEP-IRA**

*Roth IRA: If transfer, provide original conversion/establishment date and amount: _____

**SEP-IRA: Employer name: _____

4. Signatures

If section 2 is completed, the account holder must sign. If section 3 is completed, the account holder or Representative must sign.

Account holder's signature	Date signed (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>
Registered Representative's signature	Date signed (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>

Securities distributed by Sammons Financial Network®, LLC., member FINRA. Sammons Institutional Group®, Inc. provides administrative services. Sammons Financial Network®, LLC., and Sammons Institutional Group®, Inc. are wholly owned subsidiaries of Sammons® Financial Group, Inc. Sammons Retirement Solutions® is a division of Sammons Institutional Group®, Inc.

