



VANTAGE®

Deposit Coupon

Date Stamp
(Office use only)
Rev. 11/5/19

This is a fillable PDF form. To complete the form, click in an area and type.

Account Owner Information (As it appears on your account application)

Legal Name: _____

First, Middle, Last

Vantage Account #: _____ Deposit Amount: \$ _____

Deposit Type (Please select how deposit funds will be received)

Check (Please allow five business days for checks to clear) Wire ACH (Please provide transaction description in the Notes section below)

Deposit Frequency (Please select a deposit frequency)

One Time Deposit Monthly Quarterly Semi-Annually Annually

IRA Contribution Details (Please select account type and contribution year)

Contribution to: Traditional IRA Roth IRA SEP IRA SIMPLE IRA Other: _____

Contribution for: Current Year: _____ Previous Year: _____

Deposit Details (Please provide the appropriate deposit details)

Rental Income

Rental Property Address: _____ City: _____ State: _____ Zip: _____

Incoming Loan Payment

Loan Name: _____ Interest Income: \$ _____ Principal Amount: \$ _____

Dividends

LLC Name: _____ Amount: \$ _____

Other Income: _____

Notes

Signature

Vantage Retirement Plans, L.L.C. ("Administrator") performs recordkeeping and administration duties in connection with Account Owner's self-directed account (the "Account") on behalf of the custodian ("Custodian") as set forth in Account Owner's account application (the "Account Application"). The terms and conditions of this document are incorporated into the Account Application, and the terms and conditions of the Account Application are incorporated herein.

I hereby certify and acknowledge it is my responsibility to correctly characterize the nature and purpose of the deposit being made hereunder. I understand the Administrator does not provide legal, tax, or investment advice and it is my responsibility to obtain pertinent advice and counsel from qualified third party professionals with respect to the subject matter hereof. I hereby agree to release, indemnify, and hold Administrator and Custodian harmless from any and all liability that may arise as a consequence of Administrator processing this deposit as set forth herein.

Account Owner's Signature: _____ Date: _____