



VANTAGE

# Deposit Coupon

Date Stamp  
(Office use only)  
Rev. 4/5/2022

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

**IF THIS IS A FINAL PAYMENT COMPLETE THE SELL DIRECTION LETTER FORM**

## 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

## Deposit Details *(Please provide the appropriate deposit details)*

### 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: \_\_\_\_\_

### Rental Income Details

Rental Property Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

### Loan Payment Details

Borrower/Property Address: \_\_\_\_\_ Interest Income: \$ \_\_\_\_\_ Principal Amount: \$ \_\_\_\_\_

### Dividend Details

Private Entity Name: \_\_\_\_\_

### Other Income Details

Other Income: \_\_\_\_\_

## 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 Signature: \_\_\_\_\_ Date: \_\_\_\_\_