

IRA Authorization

name (please print)_____
home phone number_____
work phone number_____
member account number (required)

Please check one: Traditional IRA Roth IRA SEP

DEPOSIT to my IRA: A contribution of \$ _____ for 20 ____ tax year

TRANSFER from my savings account, checking account or supplemental savings account to my IRA:

A contribution of \$ _____ for the 20 ____ tax year

TRANSFER from my savings account, checking account or supplemental savings account to my:

Spouse's IRA account # _____ a contribution of \$ _____ for the 20 ____ tax year

Designation of contribution as prior year is irrevocable. (If prior year contribution – spouse must sign below)

This is your authority to take payroll deductions from each paycheck for credit to: (only for employees of United Airlines)

my IRA in the amount of \$ _____

my spouse's IRA account # _____ in the amount of \$ _____

Paycheck date determines tax year of contribution. Payroll deductions will continue until changed or stopped by member. When the annual maximum current year IRA contribution is reached, deductions will automatically be deposited to your savings account. IRA deductions will resume the following year.

Weekly payroll: deductions will be posted bi-weekly.

Stop deductions

This is your authority to convert \$ _____ from my Traditional IRA to my existing credit union Roth IRA.
(Forward to Alliant Headquarters - IRA Services for processing.)

IRA owner signature (required)_____
date_____
spouse signature (required if applicable)_____
date

Service Centers - Forward IRA Authorization to Alliant Headquarters – IRA Services if contribution was for a prior year.

RETURN COMPLETED FORM TO ALLIANT CREDIT UNION. FAX: 773-462-8735