

Instructions: Complete this form to provide LPL with deposit instructions for a check or a stock certificate. This form should be submitted to LPL for all retirement account deposits via check or security.

Mail Checks to:
LPL Financial Corporation
Attn: M Desk
P.O. Box 500950
San Diego, CA 92150-0950

Mail Securities to:
LPL Financial Corporation
Attn: Custody Dept.
P.O. Box 502210
San Diego, CA 92150-2210

Overnight Delivery to:
LPL Financial Corporation
Attn: M Desk or Attn: Custody
9785 Towne Centre Drive
San Diego, CA 92121-1968

1.	Account Information		
	Account Number <input style="width: 95%;" type="text"/>	Social Security Number <input style="width: 95%;" type="text"/>	Rep ID <input style="width: 95%;" type="text"/>
	Account Owner Name <input style="width: 95%;" type="text"/>	Birth Date <input style="width: 95%;" type="text"/>	

2.	Check Deposit Instructions		
	Check Number <input style="width: 95%;" type="text"/>	Dollar Amount of Check <input style="width: 95%;" type="text"/>	Date on Check <input style="width: 95%;" type="text"/>
	Please Note - Beneficiary IRAs can only receive deposits from another Beneficiary IRA with the same registration in which the withdrawal is not reported to the IRS.		
	CURRENT YEAR	PREVIOUS YEAR	
	\$ <input style="width: 80%;" type="text"/>	\$ <input style="width: 80%;" type="text"/>	IRA Contribution (Available for Traditional IRA, Roth IRA, SEP IRA, SARSEP IRA or Coverdell ESA)
	\$ <input style="width: 80%;" type="text"/>	\$ <input style="width: 80%;" type="text"/>	Employer Contribution (Available for SEP IRA, SARSEP IRA, SIMPLE IRA, 403(b), Profit Sharing, Money Purchase, 401(k))
	\$ <input style="width: 80%;" type="text"/>	\$ <input style="width: 80%;" type="text"/>	Employer Match (Available for SIMPLE IRA, 403(b), 401(k))
	\$ <input style="width: 80%;" type="text"/>	\$ <input style="width: 80%;" type="text"/>	Employee Deferral (Available for SARSEP, SIMPLE, 403(b), 401(k))
	\$ <input style="width: 80%;" type="text"/>		Rollover Contribution (Available for Traditional IRA, SEP IRA, SARSEP IRA, 403(b), Profit Sharing, Money Purchase, 401(k)) (Only available for Roth IRA if the distribution was from a Roth IRA) (Only available for Coverdell ESA if distribution was from a Coverdell ESA)
	\$ <input style="width: 80%;" type="text"/>		Conversion Contribution (Only available for assets moving from Traditional IRA to Roth IRA)
	\$ <input style="width: 80%;" type="text"/>		Trustee Transfer (Only available for non-reportable transfers between accounts with the same registration)

3.	Security Deposit Instructions		
	Number of Shares/Units <input style="width: 95%;" type="text"/>	CUSIP Number <input style="width: 95%;" type="text"/>	Description of Asset <input style="width: 95%;" type="text"/>
	Please Note - The IRS does not allow contributions to retirement accounts to be made in shares except as a Rollover or a Transfer, in which case the asset deposited must be the same asset that was withdrawn.		
	<input type="radio"/> Rollover - (Available for Traditional IRA, SEP IRA, SARSEP IRA, 403(b)(7), Profit Sharing, Money Purchase, 401(k)) (Only available for Roth IRA if the distribution was from a Roth IRA) (Only available for Coverdell ESA if distribution was from a Coverdell ESA)		
	<input type="radio"/> Transfer - (A non-reportable transfer between accounts with the same registration)		

