

Please Print or Type

\_\_\_\_\_  
CUID (Credit Union will Complete)

\_\_\_\_\_  
Credit Union Name

\_\_\_\_-\_\_\_\_-\_\_\_\_-\_\_\_\_-\_\_\_\_-\_\_\_\_  
Social Security Number

\_\_\_\_\_  
IRA Suffix

\_\_\_\_\_  
IRA Owner's Name (First, Initial, Last)

\_\_\_\_\_  
Account Number

**GENERAL INFORMATION**

A Contribution made to an IRA between January 1 and the tax return due date (usually April 15) can be treated either as a contribution for the current year or as a contribution for the preceding year.

We are required to report to the IRS how you want to treat each contribution made during this time period.

Please tell us the tax year to which your contribution applies by completing and signing this form.

**Do not complete this form for direct transfers, rollover contributions, Simplified Employee Pension (SEP) contributions, or recharacterizations.**

**CONTRIBUTION AMOUNT AND TAX YEAR**

\$ \_\_\_\_\_  
Amount of Contribution

\_\_\_\_\_  
Tax Year to Which Contribution Applies (YYYY)

**IRA OWNER'S SIGNATURE**

X \_\_\_\_\_  
IRA Owner's Signature

\_\_\_\_\_  
Date (MM/DD/YYYY)

**For Credit Union Use Only**

\_\_\_\_\_  
Name of Credit Union Employee Who Took Deposit

\_\_\_\_\_  
Date of Deposit (MM/DD/YYYY)