

Trust Advantage IRA Enrollment or Modification(s)

Must select one: Enroll Modify existing

Contributions to all Traditional and Roth IRA accounts cannot exceed the Internal Revenue Service Code Limit. The information provided on this form will be provided to your payroll coordinator.

1. Participant Information

Social Security No. _____ Date of Birth _____
(Required to process this form)

Name _____ Phone (_____) _____
Last First Middle

School District _____

- ▶ If you are **opening a new IRA account**, please complete and submit this form with the appropriate IRA account application to WEA Trust Member Benefits.
- ▶ If you are **establishing your participation in Trust Advantage for the first time**, please also complete a *Payroll Deduction Authorization* form and submit it to your payroll coordinator.

Trust Advantage requires a \$20 monthly minimum contribution.

2. Traditional IRA Account Information (Deduction code: TIG-IRA Trad.)

I want to begin or change contributions to my Traditional IRA Account via payroll deduction.

Per paycheck deduction for Traditional IRA Account of \$ _____

Effective date: As soon as possible In month of _____

I want to stop contributions to my Traditional IRA Account.

3. Roth IRA Account Information (Deduction code: RIG-IRA Roth)

I want to begin or change contributions to my Roth IRA Account via payroll deduction.

Per paycheck deduction for Roth IRA Account of \$ _____

Effective date: As soon as possible In month of _____

I want to stop contributions to my Roth IRA Account.

4. Signature and Date

Participant's Signature _____ Date _____

(Please be sure to select the appropriate type of IRA.)