



ROTH IRA CONTRIBUTION REMITTANCE FORM

In order to make a regular contribution to a Roth IRA, you must first have established a Roth IRA by completing and submitting a Roth IRA Enrollment Form to Pension Fund and you must be (i) a current employee of an employer that is eligible to participate in the Defined Contribution Retirement Accounts of the Pension Fund of the Christian Church (Disciples of Christ) ("DCRA") or (ii) the spouse of such eligible employee. You can make regular contributions to the Roth IRA from your spouse's taxable compensation if you file a joint tax return with your spouse.

Do not use this Form to make a rollover contribution or transfer to a Roth IRA, including a conversion or recharacterization. Use the Application for Rollover/Transfer to Roth IRA instead.

- PLEASE TYPE OR PRINT CLEARLY -

I. IRA OWNER INFORMATION

IRA Owner Name _____ Account No. _____
(first) (middle) (last/family name)

☐ **Check here if there has been a change to your contact information on file.**

Home Address _____

City _____ State _____ Country _____ Zip Code _____ - _____

Daytime Phone Number (____) _____ E-Mail Address _____

II. CONTRIBUTION INFORMATION

Indicate contribution type below (*check one or more as applicable*).

☐ **Single Sum Contribution.** I am remitting an *after-tax* contribution amount to my Roth IRA equal to \$ _____.

This contribution is being made by ☐ check (*including checks sent by or through your bank*)
☐ one-time debit (ACH) from my bank account (*complete the bank information below*)

I irrevocably elect that this contribution be made for the tax year 20_____. *Contributions must be received by the tax filing deadline, without extensions, for the year for which the contribution is being made (generally, by April 15). If no year is indicated, the contribution will apply to the current tax year. For future contributions, complete the Roth IRA Contribution Remittance Form or elect to make recurring contributions below, or log into your Pension Fund Member Portal to set up and manage your recurring contributions once your account is established.*

☐ **Recurring Contributions.** Effective as soon as administratively practicable on or after _____, 20_____, I authorize *after-tax* contributions to be made to my Roth IRA through automatic debit (ACH) from my bank account. *Complete the bank information below.*

Future contributions of \$ _____ to be debited on the (*check one only*) ☐ 1st ☐ 15th

Complete below if you elect a one-time or recurring bank debit and attach a "void" check to this Form:

Name of Bank _____ Account Holder Name _____

Mailing Address of Bank _____ Phone Number (____) _____

City _____ State _____ Country _____ Zip Code _____ - _____

Account Number _____ Bank Routing/ABA Number _____ ☐ Checking ☐ Savings

IMPORTANT: Regular contributions may not exceed the Internal Revenue Service limits for the taxable year. If you are or will be age 50 by the end of the year, you may make an additional contribution for the taxable year. The regular contribution limits are reduced for higher income earners. Regular contributions made to a traditional IRA reduce the amount you can contribute to a Roth IRA. *See the IRA Owner Resource Book at www.pensionfund.org for information on these limits.*

III. IRA OWNER CERTIFICATION AND SIGNATURE

By signing this Form, I assume complete responsibility for ensuring that all contributions I make are within the applicable limits under the tax laws and for the tax consequences of any contribution and distributions. I understand that I am responsible for determining and tracking the cost basis in the Roth IRA. I certify that I am an employee of an employer that is eligible to participate in the DCRA, or the spouse of such eligible employee.

Roth IRA Owner Signature _____ **Date** ____/____/____

SEND FORM WITH CONTRIBUTION TO:

Pension Fund of the Christian Church

P.O. Box 639905, Cincinnati, OH 45263-9905

Toll Free Phone: 1.866.495.7322 • Phone: 317.634.4504 • Fax: 317.634.4071

E-mail: pfcc1@pensionfund.org • Website: www.pensionfund.org