

Funding Your Entrust Account

You have options when it comes to funding your Entrust Self-Directed Retirement Account. Once you've decided which option is best for you, visit www.TheEntrustGroup.com/Forms to get started.

Contribution

Contribute up to the maximum amount allowed by the IRS. A contribution may be made via check, wire, or ACH.

Form Required: Deposit Coupon

Rollover

Rollover: Take a distribution from a previous IRA custodian. This means requesting the funds from the account be paid directly to the account owner. The funds must be sent, or rolled over, to Entrust within 60 days from the time the distribution is taken. After 60 days, the IRS will impose taxes and penalties.

Direct Rollover: Move retirement funds from an account with a previous employer, such as a 401(k), 403(b) or a governmental 457(b) plan, directly into an Entrust Self-Directed IRA.

Form Required: Rollover/Direct Rollover Certification Form

Transfer

Transfer funds from an existing IRA at another custodian directly to Entrust. If funds are transferred from more than one IRA, fill out a separate form for each account. Each transfer form must be accompanied with a copy of the current custodian's IRA statement.

Form Required: Transfer Form