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📍 Horizon Trust Correspondence, PO BOX 27068, Newark NJ 07101

If a payment is being submitted by someone **other than** the account owner, the account owner **must** sign below to acknowledge the deposit. If you are rolling over assets, please complete a Rollover Certification Form for your account type.

PART 1. ACCOUNT OWNER INFORMATION

First Name:	M.I.:	Last Name:	Account #:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last 4 SSN Digits:	Date of Birth: (MM/DD/YYYY)	Email Address:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

PART 2. CONTRIBUTION DEPOSIT INFORMATION

Contributions to retirement accounts must be made from personal funds, with the exception of Employer-Sponsored accounts. In Employer-Sponsored accounts, contributions can include employer contributions, with funds typically provided by the sponsoring company and/or employer.

IRA or Savings Account

Traditional Roth CESA HSA

Employer Sponsored IRA

Simple IRA **SEP IRA**

Employer Contribution Employer Contribution

Employee Deferral

! Note: Elective salary deferrals and catch-up contributions are not permitted in SEP plans

Solo 401(k)

SOLO 401(k) Tax Deferred **SOLO 401(k) Tax Free**

Employer Contribution Designated Roth 401(k) Employer Contribution

Employee Deferral Designated Roth or After-Tax 401(k) Employee Deferral

Contribution Details

Contribution Amount: \$ Contribution Tax Year:

Wire/Direct Deposit Check Check Number:

Expected Transfer Date: One-Time Recurring

PART 3. ACCOUNT OWNER AUTHORIZATION

By submitting this form, I, as the account owner, acknowledge that I am responsible for the selection, due diligence, management, review, and retention of all investments in the account.

Signature of Account Owner:	Account Owner Name: (Print or Type)	Date: (MM/DD/YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>