Utah Retirement Systems
PO Box 1590
Salt Lake City, Utah 84110-1590
801-366-7720 or 800-688-4015
Fax 801-366-7445 or 800-753-7445
www.urs.org

Utah Retirement Systems (URS) IRA Deposit Authorization Form

INSTRUCTIONS:

1. Use this form to make contributions to the URS Traditional or Roth IRA.
2. Review all information on this form before completing.
3. Please type or print clearly using black ink.
4. Personal contributions require a **minimum deposit of $100**.
5. All IRA deposits will be invested according to your *investment of future contributions* on file with URS.
6. Make checks payable to Utah Retirement Systems and submit with this form to the address listed above.

SECTION A - GENERAL INFORMATION

Name (First, Middle, Last)

Social Security # or Account # - Please print clearly -

Mailing Address

Daytime Phone Number
( )

City State Zip

SECTION B - REQUIREMENTS FOR DEPOSIT

- A URS Traditional IRA or URS Roth IRA must be opened before any deposit will be accepted.

- To open a URS IRA, log in to your account at urs.org or complete a URS *IRA Enrollment Contract (DTEN-1).*

- Contributions to a Roth or traditional IRA may be subject to income limits based on your modified adjusted gross income. Please see *IRS Publication 590* or the *URS Roth and Traditional IRAs Guidebook* for details.

- Contributions to an IRA can be made from January 1st of the current year until the tax filing deadline (generally April 15th) of the following year.

- IRA deposits will be invested according to your *investment of future contributions* on file with URS.

- For detailed information regarding the rules and regulations of traditional and Roth IRAs please see *IRS Publication 590.*

SECTION C - ACCOUNT TYPE

This deposit is to be made to my (**Check only one**):

☐ URS ROTH IRA

☐ URS TRADITIONAL IRA

SECTION D - DEPOSIT INSTRUCTIONS

Personal Contribution: Can be a personal check, cashier's check or money order (we are unable to accept cash); must be an amount of $100 or more. Make checks payable to Utah Retirement Systems.

☐ Contribution in the amount of $_____ for the ***current*** tax year, 20_____.

☐ Contribution in the amount of $_____ for the ***prior*** tax year, 20_____.

SECTION E - CERTIFICATION AND SIGNATURE

I accept full responsibility for complying with all IRS requirements with respect to my URS IRA. I certify that the funds contributed are eligible to be deposited to the applicable IRA in Section C. I have read all sections of this form and I assume responsibility for any tax consequences that may result if the contribution requirements are not met. I acknowledge and agree that any false or misleading information submitted on this form or any attached form may subject me to personal liability and Utah Retirement Systems may exercise its rights against me if damaged by false or misleading information submitted by me.

Signature **Date**