

Deposit Direction

(877) 806-7362 | team@altscustodian.com



Accountholder Information

Account Holder Name	Account Number Assigned by Alts Custodian
Last four digits of SSN (####)	Date Of Birth (Optional) (MM/DD/YYYY)

Deposit Details

Contribution

Contribution Amount:	Contribution Tax Year:
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Asset Income

Total Payment Amount:	Asset Name:
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Full sale of asset Interest Dividends

Loan repayment (enter the borrower's name below) Allocated interest amount: Allocated principle amount

Partial sale of asset Number of units/ shares sold: Percent of asset ownership sold (%):

Other (provide information below)

Payment Details

PLEASE SELECT YOUR FUNDING METHOD (select one): CHECK WIRE ACH

For WIRE and ACH (please complete this section if you selected WIRE or ACH)

ACH PAYMENT NOTICE

Banks limit the length of ACH instructions. If they don't get all the needed information, the payment might not go through. This could delay your transaction or make you repeat the process if the bank can't read everything required.

PAYEE NAME	BANK NAME		
For Further Credit To	Bank ABA / Routing Number	Account Number	
Payee Street Address	City	State	Zip Code

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Payment Details

Additional Information

Check *(Additional fees may apply, see current Fee Schedule for applicable fees.)*

Sender's Name:

Account Owner Authorization

I certify that all information provided by me is correct and may be relied upon by the Custodian. I understand that I am responsible for determining eligibility requirements related to my account(s) and investments and if necessary have sought assistance from qualified legal, tax, or investment professionals.

Signature:

Account Owner Name: *(Print or Type)*

Date: *(MM/DD/YYYY)*