

# UCON

\_\_\_\_\_,  
*(last name)*

\_\_\_\_\_  
*(first name)*

\_\_\_\_\_  
*(enter IRA account number)*

## RE: IRA Contribution via Journal Transfer

Dear Trading Direct / Penson Financial Services,

Please make the following cash journal transfer from my individual brokerage account to Individual Retirement Account:

Amount:\$ \_\_\_\_\_

From: \_\_\_\_\_  
*(individual taxable account number)*

To: \_\_\_\_\_  
*(IRA account number)*

Tax year of contribution: \_\_\_\_\_

X \_\_\_\_\_  
*(Signature)*

\_\_\_\_\_  
*(Date)*