

IRA CONTRIBUTION FORM

(For use with subsequent deposits into an IRA)

Account Name _____

Account Number _____

Date _____

CONTRIBUTION ALLOCATION INFORMATION:

Contribution Date* : _____ Contribution for Tax Year : _____

* April 15 Deadline: Prior year annual contributions must be remitted to Monteagle Funds and postmarked on or before April 15.

Contribution Type & Receipt Amount:

- | | | |
|--------------------------|---|----------|
| <input type="checkbox"/> | Traditional annual (see IRA Disclosure for contribution limits) | \$ _____ |
| <input type="checkbox"/> | Transfer from IRA to IRA | \$ _____ |
| <input type="checkbox"/> | Roth IRA annual (see IRA Disclosure for contribution limits) | \$ _____ |
| <input type="checkbox"/> | Transfer from Roth to Roth | \$ _____ |
| <input type="checkbox"/> | Conversion from Traditional IRA to Roth | \$ _____ |
| <input type="checkbox"/> | Recharacterization from Trad. IRA to Roth | \$ _____ |
| <input type="checkbox"/> | SEP contribution (funded by the employer) | \$ _____ |
| <input type="checkbox"/> | SIMPLE contribution | \$ _____ |
| <input type="checkbox"/> | Transfer from existing account _____ | \$ _____ |
| | Identify account type | |
| <input type="checkbox"/> | Direct rollover from QP or eligible plan to IRA | \$ _____ |
| <input type="checkbox"/> | Death rollover (from decedent IRA to spouse's IRA) | \$ _____ |
| <input type="checkbox"/> | 60 day cash rollover from IRA to IRA | \$ _____ |
| <input type="checkbox"/> | Recharacterization from Roth to Trad. IRA | \$ _____ |
| <input type="checkbox"/> | Other _____ | \$ _____ |

Monteagle Funds Investment Election:

Value _____% Large Cap Growth _____% Fixed Income _____% Quality Growth _____% Select Value _____%

EXPLANATION: Enter further details of the contribution transaction.

CERTIFICATION:

I certify that the information provided by me is accurate, and instruct Monteagle Funds to process my contribution as designated. I understand that the tax year indicated for my contribution OR my election to treat a deposit as a rollover contribution is an irrevocable designation. I will consult with my own professional tax advisor(s) when appropriate and have not relied upon Monteagle Funds for advice concerning the tax or financial results of this contribution. **I assume sole responsibility for all tax consequences associated with designating this IRA contribution** and hold Monteagle Funds harmless against any and all claims and situations arising from this transaction.

Signature of IRA Owner

Date

