

SAVINGS IRA – CREDIT TRANSACTION FORM

ACCOUNT NAME _____

DATE ____/____/____

PREPARED BY _____

SAVINGS IRA TRANSACTIONS

- 651 - CURRENT YEAR CONTRIBUTION
- 652 - PREVIOUS YEAR CONTRIBUTION
- 653 - EMPLOYER CURRENT YEAR CONTRIBUTION
- 654 - EMPLOYER PREVIOUS YEAR CONTRIBUTION
- 655 - ROLLOVER CONTRIBUTIONS
- 656 - TRANSFER FROM ANOTHER ACCOUNT
- 657 - TRANSFER FROM ANOTHER SOURCE
- 658 - NON-DEDUCTIBLE CONTRIBUTION CURRENT YEAR
- 659 - NON-DEDUCTIBLE CONTRIBUTION PREVIOUS YEAR
- 660 - ROTH CONVERSION CONTRIBUTION
- 661 - RECHARACTERIZATION

AMOUNT

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TRAN CODE

ACCOUNT NUMBER

⑆5300⑆0000⑆

898