

IRA Contribution Designation Form

NOTE: To make a contribution, please complete this form and include your check. Make checks payable to Columbia Private Trust, FBO (your name), IRA. (Want to make a contribution via ACH? See our ACH For Contributions form, available at ColumbiaPrivateTrust.com/Forms.)

1. ACCOUNT OWNER INFORMATION

| | | |
|-------------------------|------------------------------------|----------------|
| NAME (FIRST, MI, LAST)* | COLUMBIA PRIVATE TRUST ACCOUNT NO. | |
| AMOUNT ENCLOSED* \$ | DATE* | PRIMARY PHONE* |

2. IRA CONTRIBUTION LIMITS

| TAXABLE YEAR | CONTRIBUTION LIMIT | CATCH UP LIMIT FOR AGE 50+ |
|--------------|--------------------|----------------------------|
| 2025 | \$7,000 | \$1,000 |
| 2026 | \$7,500 | \$1,100 |

3. CONTRIBUTION INSTRUCTIONS

Credit my contributions as follows:

\$ _____ Traditional IRA For Tax Year: _____

\$ _____ Traditional IRA For Tax Year: _____

\$ _____ Roth IRA For Tax Year: _____

\$ _____ Roth IRA For Tax Year: _____

\$ _____ Rollover (must complete Rollover Certification below)

\$ _____ SEP IRA (contributions are reported in the year received, according to IRS regulations)

\$ _____ Other: _____

4. IRA ROLLOVER CERTIFICATION (REQUIRED IF YOU ARE MAKING A ROLLOVER CONTRIBUTION)

I hereby certify that this is a valid rollover Contribution that meets all IRS requirements. I have not executed another rollover from any other IRA, including Traditional, SEP, Roth or SIMPLE IRA accounts in the past 12 months. I hereby irrevocably authorize the deposit of the rollover contribution and understand that I am fully responsible for the tax consequences of this transaction.

| | |
|---|-------|
|  ACCOUNT OWNER SIGNATURE* | DATE* |
|---|-------|

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| Upload forms to: ColumbiaPrivateTrust.com/Upload Fax to: 303.614.7086 | Send mail to: Columbia Private Trust Processing Center P.O. Box 981012 Boston, MA 02298 | For express deliveries: FIS-Remittance Processing Loading Dock #2 Attn: Columbia Private Trust 10 Dan Road Canton, MA 02021 | Questions? Call 800.962.4238 |
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