



**Investment Services Agreement
Individual**

Domestic ACH / Wire / International Wire Form
Use for Domestic ACH/Wire & International Wire
 International ACH Transfer [IAT] Transactions require the International ACH Transfer [IAT] form

Please include a deposit ticket for verification

Name / Identification and Legal Address of Sender of ACH or Wires

First: *	Middle:	Last: *	
Date of Birth: *		SSN: *	
Address: * (cannot be a P.O. Box)			
City: *	State/Province: *	Postal Code: *	Country:*

I hereby authorize KeyBank National Association, as trustee or agent, to initiate credits (and debits if necessary) by pre-authorized electronic funds transfer to the following bank(s)

Complete Transfer information for EACH EFT transaction. If there are additional transfers, feel free to copy this sheet.

Banking Information

Bank Name: *	Bank Address: *		
	Bank Phone #:		
City: *	State/Province: *	Postal Code: *	Country:*

ACH	Is this transaction an ACH: * <input type="checkbox"/> YES <input type="checkbox"/> NO If YES, check the account type and provide the bank routing # and account #	<input type="checkbox"/> DDA (checking) Bank Routing #:*
		<input type="checkbox"/> TDA (savings) Account #:*
WIRE	Is this transaction a DOMESTIC Wire: <input type="checkbox"/> YES <input type="checkbox"/> NO If YES, provide Bank ABA number and the account number.	Bank ABA #:*
		Account #:*
Inter-national Wire	Is this transaction an INTERNATIONAL Wire: <input type="checkbox"/> YES <input type="checkbox"/> NO If YES, provide Bank Identification Code (BIC) or SWIFT Code and the account number.	Bank Identification Code (BIC) or SWIFT Code: *
		Account #:*

This authorization is to remain in full force and effect until the Trustee or Agent has received written notification from me of its termination.

****On a Joint Account, both parties MUST sign****

Signature – (REQUIRED) _____ Date _____ Co-Owner Signature–(REQUIRED) _____ Date _____