Please remember to sign form after printing.

Print

Clear Form

Payroll Deduction IRA Transmittal Form

Employers may use this form to submit payroll contributions for current tax year to an employee's Traditional IRA, Roth IRA or Coverdell Education Savings Account (Coverdell ESA). This form is for use by the employer or their payroll provider only.

Do not use this form to establish a new account. The appropriate Invesco account application must be submitted.

To update investment allocations on an existing account, the account owner or financial advisor may do one of the following:

- Submit an Invesco Investment Allocation Change Form or a signed letter of instruction
- Contact an Invesco Client Services representative at 800 959 4246

PLEASE USE BLUE OR BLACK INK **PLEASE PRINT CLEARLY IN BLOCK CAPITAL LETTERS**

1 | Employer Information

Start > Here Use "Tab" key to move to next field.

Employer's Name

Mailing Address

City

State

ZIP

Employer Contact Name

Employer Contact Primary Phone Number

Employer Contact Email Address

☐ Check this box if this is a new Employer Contact.

☐ Check this box if this is a new address for the employer. Please update the plan address of record. *(Signature of employer required below.)*

Employer Signature

X

Date (mm/dd/yyyy)

Name *(Please print)*

Title

2 | Mailing Information

Please make check payable to Invesco Investment Services, Inc. (IIS). IIS does not accept the following types of payment: Cash, Credit Card Checks, Temporary/Starter Checks, and Third Party Checks.

(Direct Mail)
Invesco Investment Services, Inc.
P.O. Box 219078
Kansas City, MO 64121-9078

(Overnight Mail)
Invesco Investment Services, Inc.
c/o DST Systems, Inc.
430 W. 7th Street
Kansas City, MO 64105-1407

For additional assistance please contact an Invesco Client Services representative at 800 959 4246, weekdays, 7 a.m. to 6 p.m. Central Time.

3 | Contribution Instructions

Employer's Name

Payroll Date (mm/dd/yyyy)

Please provide the contribution amount under the column(s) for the appropriate account type(s). Do not include investment allocations; IIS has current fund allocations for existing accounts on file.

Notes:

- Contributions will be deposited as current year contributions for the year in which they are received.
- Prior year contributions *MUST* be submitted separately using the Invesco Investment Instruction Form.

Name of Account Owner	Social Security Number	Traditional IRA	Roth IRA	Coverdell ESA
1.		$	$	$
2.		$	$	$
3.		$	$	$
4.		$	$	$
5.		$	$	$
6.		$	$	$
7.		$	$	$
8.		$	$	$
9.		$	$	$
10.		$	$	$
11.		$	$	$
12.		$	$	$
13.		$	$	$
14.		$	$	$
15.		$	$	$
16.		$	$	$
17.		$	$	$
18.		$	$	$
19.		$	$	$
20.		$	$	$
21.		$	$	$
22.		$	$	$
23.		$	$	$
24.		$	$	$
25.		$	$	$
	Subtotals	$ 0.00	$ 0.00	$ 0.00
	Total of all Contributions	$ 0.00	**(Amount of Check)**	

Please copy for additional contributions.