

# Additional Investment for IRAs

**✓ Use this form to:**

- Make an annual individual retirement account (IRA) contribution, rollover contribution, or repayment of a qualified distribution by check. Please consult your tax advisor if you are unsure of your eligibility to make the type of contribution you have elected.

**✗ Do not use this form to:**

- Establish an IRA. Use the [IRA Mutual Fund New Account](#) form.

**Mail to:**

T. Rowe Price  
P.O. Box 17300  
Baltimore, MD 21297-1300

**Express delivery only:**

T. Rowe Price Mail Code 17300  
4515 Painters Mill Road  
Owings Mills, MD 21117-4903

- ✍ This paper clip indicates you may need to attach documentation.
- ✍ This hand indicates where to sign.

SSN = Social Security Number

Please consult your tax advisor if you are unsure of your eligibility to make the type of contribution you have elected.

## 1 IRA Account Information

Complete this form and mail it in the enclosed envelope with a check payable to T. Rowe Price for the total amount of your investment. Use a separate form for each IRA type.

Check IRA type:

- Roth  Traditional  Rollover  Roth Rollover  SEP-IRA  
 SIMPLE IRA\*

\*Annual IRA contributions not permitted in a SIMPLE IRA. You can only roll over into the T. Rowe Price SIMPLE IRA from another SIMPLE IRA.

Owner	Plan Number (for SEP and SIMPLE IRAs)
SSN	Contact Phone

**IRA Contribution: (You must have an existing T. Rowe Price IRA.)**

IRA contribution amounts are subject to certain IRS-imposed eligibility limits (such as age or income) depending on the type of IRA. In addition, IRAs are subject to annual contribution limits. See *IRS Publication 590-A* for further details. To make an annual IRA contribution, check a box below:

- Annual IRA Contribution. As indicated in the [T. Rowe Price Traditional and Roth IRA Disclosure Statement and Custodial Agreement](#), contributions will be credited for the tax year in which it was received unless you provide the prior year under the Tax Year column in Section 2. Contributions for the prior tax year must be postmarked on or before the tax filing deadline (generally April 15)—not including extensions.
- Postponed IRA Contribution. Provide the tax year to apply contribution under the Tax Year column in Section 2, and select the applicable justification below.
  - I am serving in or in support of the Armed Forces in a designated combat zone or qualified hazardous duty area and have an additional period to make a prior year IRA contribution. List combat zone/qualified hazardous duty area or applicable code. See the IRS instruction for *Form 1099-R and 5498* for more details and applicable codes: \_\_\_\_\_
  - I am a taxpayer affected by a federally designated disaster area, as described in an IRS News Release.

**IRA Rollover Contributions and Distribution Repayments:**

Generally, you must make rollover contributions by the 60th day after you receive the distribution from your IRA or retirement plan. If this is a rollover contribution or repayment, please check the applicable box below:

- Rollover Contribution. I made the rollover contribution no later than the 60th day after I received the distribution from my IRA or qualified retirement plan.

If you qualify for one of the exceptions below, please select the applicable rollover or repayment types.

- Self-Certification of Eligibility for Waiver. I qualify for a waiver of the 60-day rollover under Revenue Procedure 2016-47 and have enclosed a Certification for Late Rollover Contribution letter (available at <https://www.irs.gov/pub/irs-drop/rp-16-47.pdf>) with an applicable reason selected. Note: A copy of the certification should be kept in your files and be available if requested during an IRS audit. ✍
- Repayment of Qualified Reservist Distributions. I am repaying a qualified reservist distribution, which is a distribution from an IRA or from an employer-sponsored retirement plan, such as a 401(k) or 403(b) plan. I am within the two-year period from the time my active duty ends to repay some or all of the qualified reservist distribution.
- Repayment of Qualified Disaster Distribution. I am repaying a qualified disaster distribution, which is a hardship distribution from a 401(k) plan or a 403(b) plan or a qualified first-time homebuyer distribution from an IRA, that was not used to purchase or construct a principal residence in the designated disaster area due to the applicable hurricane. I am within the three years from the time of the qualified disaster distribution to repay some or all of the amount.  
Natural Disaster: \_\_\_\_\_  
Affected Area: \_\_\_\_\_
- Plan Loan Offset Rollover Contribution. I request that this is a rollover contribution being made 61 days or more after a qualified plan loan offset of all or a portion of an outstanding loan that was in good standing and accelerated at the time the loan. The outstanding loan offset as a result of plan termination or severance from employment. I have determined that I have up until my tax filing deadline plus applicable extension to roll over the plan loan offset amount before it will be considered a taxable distribution to me. I have verified that Code "M" will be or is reflected in Box 7 of the IRS Form 1099-R associated with my distribution from the plan. Select *Rollover Contribution* if the rollover is made within 60 days of receipt of the amount related to the plan loan offset.



## 2 Investment Allocation

Complete this table to allocate your investment to the appropriate fund (if applicable). **As indicated in the [T. Rowe Price Traditional and Roth IRA Disclosure Statement and Custodial Agreement](#), if an annual contribution is made without a tax year designated here, the contribution will be credited for the calendar year in which it is received.** If there are residual investment allocation amounts, we will default investment to the first fund listed.

Fund Name	Tax Year	Amount
		\$
		\$
		\$
Total =		

Check the box below if you are starting a new mutual fund investment within an existing IRA of the same type. See account types in Section 1.

- New Mutual Fund.** If this is a new mutual fund, we will use the account registration of the IRA provided in Section 1 to model the new fund. Minimum investment per fund is \$1,000 for an IRA. All services and beneficiaries (if applicable) will carry over from the existing account, except systematic services.

## 3 Signature(s)

By signing this form: I understand that T. Rowe Price will act upon my written instructions and will not be responsible for validating or confirming my eligibility for any type of IRA contribution. I certify that the above information and elections are true and accurate.

I understand that this contribution/repayment will be reported on Form 5498 based on the information provided.

I agree to be bound by the terms of the prospectus for each T. Rowe Price fund (Fund) in which I am investing. I have the authority and legal capacity to purchase mutual funds and am of legal age in my state.

### Signature(s) and Date(s) Required

Owner	Date (mm/dd/yyyy)
 X	

