

## Direct Deposit of Federal Income Tax Refund

Modern Woodmen members have the ability to request the Internal Revenue Service (IRS) to directly deposit all or part of their federal income tax refund into their Modern Woodmen Traditional IRA and/or Roth IRA subject to tax year contribution limits.

If you would like to deposit **all** of your refund into a Modern Woodmen Traditional IRA or Roth IRA:

- You can indicate this on your federal income tax return.
- You will need to include Modern Woodmen's routing and your account number.
  - Please use the following routing number: 071174512
  - Please use your MWA Traditional IRA or Roth IRA certificate number for the account number.

If you would like to deposit only **part** of your refund into a Modern Woodmen Traditional IRA or Roth IRA:

- You will need to complete the IRS Form 8888 and file this form along with your federal income tax return. You may find this form at [www.irs.gov](http://www.irs.gov).
- You will be asked to include Modern Woodmen's routing and your account number on this form.
  - Please use the following routing number: 071174512
  - Please use your MWA Traditional IRA or Roth IRA certificate number for the account number.

In addition to notifying the IRS, Modern Woodmen must also receive the following page completed in order to have your refund direct deposited. Please mail the completed form to:

Qualified Plans Department  
Modern Woodmen of America  
1701 1<sup>st</sup> Avenue  
Rock Island, Illinois  
61201

**Traditional IRA / Roth IRA  
Direct Deposit Confirmation**

**Used to confirm a deposit of an  
IRS tax refund**

Modern Woodmen of America  
1701 1st Avenue  
Rock Island, Illinois 61201  
1-800-447-9811  
www.modern-woodmen.org



**Name and Address of IRA Holder (PLEASE PRINT)**

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**IRA Information**

<b>Traditional IRA</b>	<b>Roth IRA</b>
Certificate Number: _____	Certificate Number: _____
Direct Deposit Contribution for:	Direct Deposit Contribution for:
2008 Tax Year* \$ _____	2008 Tax Year* \$ _____
2009 Tax Year \$ _____	2009 Tax Year \$ _____

\*A direct deposit contribution designated for the 2008 tax year that is not received by Modern Woodmen Bank on or before the 2008 tax filing deadline will be treated as a 2009 tax year contribution.

**Instructions**

If your direct deposit request is being made to only one account, the request is made on the federal income tax return you are filing. For direct deposits to more than one account, you must complete and file IRS Form 8888 with your federal income tax return. You must indicate the amount to be deposited into your Traditional IRA and/or Roth IRA, provide the routing number of the financial institution receiving the direct deposit contribution and provide your account (certificate) number. Modern Woodmen Bank will receive the direct deposits. The routing number to be used is **071174512**. Be sure to provide your Traditional IRA or Roth IRA account (certificate) number and check the box entitled "savings." Please contact Modern Woodmen Bank at 1-877-255-2265 with any questions you have regarding the direct deposit.

This direct deposit confirmation form must be received by Modern Woodmen of America prior to receiving your direct deposit contribution. Please be sure your certificate number is listed correctly. State the anticipated amount to be received and the tax year for which the contribution will be used. Sign and return the form to:

Modern Woodmen of America  
Qualified Plans Department  
1701 1st Avenue  
Rock Island, IL 61201

**Signature and Authorization**

I have instructed the IRS to directly deposit into my Traditional IRA or Roth IRA all or part of my federal income tax refund (up to the applicable tax year contribution limit) as a contribution to my Modern Woodmen of America qualified annuity. I authorize Modern Woodmen Bank to receive the direct deposit and instruct that upon receipt of the direct deposit they transfer my contribution to Modern Woodmen of America for such funds to be placed into my designated IRA or Roth IRA as a contribution.

X \_\_\_\_\_  
Signature

\_\_\_\_\_  
Date (month-day-year)

