



Please return this form to:
 GEBA Wealth Management
 1362 Mellon Road, #100
 Hanover, MD 21076
 Or email info@gebawealth.com

Member Number

 Telephone: (800) 826-1126

STABLE VALUE ACCOUNT (SVA) CONTRIBUTION FORM

General Information:

Applicant's Name (First, MI, Last)			Social Security Number		Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	
Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Domestic Partner <input type="checkbox"/> Divorced <input type="checkbox"/> Widow/Widower <input type="checkbox"/> Single <input type="checkbox"/> Separated						
Street Address			Date of Birth (mm/dd/yyyy)		Home Email Address	
City	State	ZIP	Home Phone No.	Work Phone No.	Cell Phone No.	

STEP 1: Type of Contribution

Make check(s) payable to GEMBA-SRP. Payroll allotment contributions are available for active civilian NSA and DIA employees only.

Group Annuity (GA)	Traditional IRA ¹	Roth IRA ^{1,2}
<input type="checkbox"/> Non-Tax Deductible GA <input type="checkbox"/> Lump sum: \$ _____ <input type="checkbox"/> Bi-weekly Payroll Allotment: \$ _____ (NSA & DIA Only) <input type="checkbox"/> Auto Debit: <input type="checkbox"/> Monthly: \$ _____ <input type="checkbox"/> Bi-weekly: \$ _____ <input type="checkbox"/> First Auto Debit Date: ____/____/____	<input type="checkbox"/> Prior Year Traditional IRA (thru April 15, received in the GEBA office by April 10) Lump sum: \$ _____ In 2020 Up to \$6,000, or \$7,000 if over age 50.	<input type="checkbox"/> Prior Year Roth IRA (thru April 15, received in the GEBA office by April 10) Lump sum: \$ _____ In 2020 Up to \$6,000, or \$7,000 if over age 50.
	<input type="checkbox"/> Current Year Traditional IRA Year: 2021 In 2021, up to \$6,000, or \$7,000 if over age 50. <input type="checkbox"/> Lump sum: \$ _____ <input type="checkbox"/> Auto Debit: <input type="checkbox"/> Monthly: \$ _____ <input type="checkbox"/> Bi-weekly: \$ _____ <input type="checkbox"/> First Auto Debit Date: ____/____/____ <input type="checkbox"/> Bi-weekly Payroll Allotment (NSA and DIA Only): \$ _____ Beginning pay period: ____/____/____	<input type="checkbox"/> Current Year Roth IRA Year: 2021 In 2021, up to \$6,000, or \$7,000 if over age 50. <input type="checkbox"/> Lump sum: \$ _____ <input type="checkbox"/> Auto Debit: <input type="checkbox"/> Monthly: \$ _____ <input type="checkbox"/> Bi-weekly: \$ _____ <input type="checkbox"/> First Auto Debit Date: ____/____/____ <input type="checkbox"/> Bi-weekly Payroll Allotment (NSA and DIA Only): \$ _____ Beginning pay period: ____/____/____

Group Annuity (GA)	Traditional IRA ¹	Roth IRA ^{1,2}
<input type="checkbox"/> 1035 Exchange (GA Only)**: \$ _____ Institution Received from: _____ Cost Basis Amount:\$ _____	<input type="checkbox"/> IRA Trustee Transfer*: \$ _____ <input type="checkbox"/> IRA Rollover: \$ _____ Institution Received from: _____	<input type="checkbox"/> Roth IRA Trustee Transfer*: \$ _____ <input type="checkbox"/> Roth IRA Rollover: \$ _____ <input type="checkbox"/> Roth IRA Conversion: \$ _____ Institution Received from: _____

*If a trustee transfer, please include a Trustee Transfer form. This form can be found at www.GEBAWealth.com/forms.

**If a 1035 exchange, please include a 1035 Exchange Request Form. This form can be found at www.GEBAWealth.com/forms.

STEP 2: Member Signature

Traditional or Roth IRA

- I currently have GEBA's most current Summary Plan Description and have enclosed the necessary IRA 5305 Forms.
- Please send me GEBA's most current Summary Plan Description and the necessary IRA 5305 Forms.

Group Annuity

- I currently have GEBA's most current Summary Plan Description.
- Please send me GEBA's most current Summary Plan Description.
- I understand that the terms and conditions which apply to this account, including withdrawal penalties, are stated in the GEMBA Summary Plan Description and the GEMBA Custodial 5305 Agreement documents (these are available on GEBA's website.) Also, I agree to be bound by the terms listed in the GEMBA Summary Plan Description and the GEMBA Custodial 5305 Agreement as currently in effect or as they may be amended from time to time. I further certify that I have read this new account form and completed all applicable sections completely and accurately. I authorize GEMBA to invest my funds in the manner indicated on this form.

Signature: _____ Date: _____

FOR GEBA OFFICE USE ONLY:

GEMBA Authorized Signature: _____ Date: _____

Wire Date Invested: ____ / ____ / ____ (Date)

1st Auto Debit Date: ____ / ____ / ____ (Date)

1st Payroll Allotment: ____ / ____ / ____ (Date)

Important Information

Beneficiary: We will automatically name the beneficiary on file unless you instruct GEBA differently.

NOTE: All contributions are invested weekly.

Payroll allotments and auto debit deductions will continue until instructions are received (by GEBA) to discontinue. Please refer to the current SRP Automatic Contribution Schedule or the current SRP Contribution Schedule for investment dates.

¹IRA Documents Needed

GEBA Wealth Management requires a signed 5305-A form for a Traditional IRA or 5305-RA for a Roth IRA. The forms can be downloaded from www.GEBAWealth.com/forms. If the 5305-A or 5305-RA form is not received with the contribution, GEBA Wealth Management will send you one to sign and return.

2021 Traditional IRA Contribution and Deduction Limits if You ARE Covered by a Retirement Plan at Work

If you have taxable compensation and your filing status is:	AND your modified AGI is:	The You Can Take
Single or head of household	Less than \$66,000	A full deduction up to the amount of your contribution limit.
	At least \$66,000 but less than \$76,000	A partial deduction.
	\$76,000 or more	No deduction
Married, filing jointly or qualifying widow(er)	\$105,000 or less	A full deduction up to the amount of your contribution limit.
	More than \$105,000 but less than \$125,000	A partial deduction
	\$125,000 or more	No deduction
Married filing separately	Less than \$10,000	A partial deduction
	\$10,000 or more	No deduction

² **2021 Roth IRA Annual Income Limits**

If you have taxable compensation and your filing status is:	AND your modified AGI is:	
Single, head of household or married filing separately and you did not live with your spouse at anytime during the year	Less than \$125,000	You can contribute up to \$6,000 (\$7,000 if you are age 50 or older).
	At least \$125,000 but less than \$140,000	
	\$140,000 or more	
Married, filing jointly or qualifying widow(er)	Less than \$198,000	You can contribute up to \$6,000 (\$7,000 if you are age 50 or older).
	At least \$198,000 but less than \$208,000	The amount you can contribute is reduced.
	\$208,000 or more	You cannot contribute to a ROTH IRA.
Married filing separately and you lived with your spouse at anytime during the year	Zero (-0-)	You can contribute up to \$6,000 (\$7,000 if you are age 50 or older).
	More than zero (-0-) but less than \$10,000	The amount you can contribute is reduced.
	\$10,000 or more	You cannot contribute to a ROTH IRA.

There are no annual contribution limits and no income limits for the Group Annuity.



Updated 08/21