

# Roth IRA Enrollment Application & Adoption Agreement



4333 Edgewood Road NE | Cedar Rapids, IA 52411  
800-755-5801 | [RetireTransamerica.com/IRA](http://RetireTransamerica.com/IRA)

Mail this application and your check (if applicable) to the designated location listed below.  
For assistance in completing this form or in opening your IRA, please call 800-755-5801.

Application paperwork only  
(Most common)

Regular Mail:  
Transamerica Retirement Solutions  
Attn: IRA Processing  
4333 Edgewood Rd. NE  
Cedar Rapids, IA 52411

Check and application paperwork  
(Make checks payable to Transamerica Retirement Solutions)

Regular Mail:  
Transamerica Retirement Solutions  
Remittance Processing Center  
PO BOX 13029  
Newark, NJ 07188

Overnight Mail:  
JP Morgan Chase  
Lockbox No: 13029  
4 Chase Metrotech Center  
Ground Level Courier on Willoughby Street  
Brooklyn, NY 11245

- New Enrollment  
 Contribution Change

## Section A. Account Number

Account No.  Affiliate No.   
Division No.

## Section B. Investor Information

Account Holder Name

Social Security No.  Primary Phone No.

Date of Birth  Email

Residential Address   
(cannot be a PO box)

City  State  Zip Code

Mailing address is same as residential address  Yes  No (if no, fill in mailing address below)

Mailing Address

City  State  Zip Code

U.S. Citizen  Yes  No If Non-U.S. Citizen List Country  Non-Resident Alien  Yes  No

Marital Status  Single  Married  Widowed  Divorced

Section C. Investment Allocations

Indicate investment allocation for new deposits using whole percentages. You may choose options from either column below, or in combination. The total allocation among all options must equal 100%.

Choose Your Portfolio – Asset Allocation Funds

M20B	Transamerica Asset Allocation Short Horizon .....	<input type="text"/> %
M35B	Transamerica Asset Allocation Short/Intermediate Horizon .....	<input type="text"/> %
M21B	Transamerica Asset Allocation Intermediate Horizon .....	<input type="text"/> %
M22B	Transamerica Asset Allocation Intermediate/Long Horizon .....	<input type="text"/> %
M36B	Transamerica Asset Allocation Long Horizon .....	<input type="text"/> %

Create Your Own Portfolio

MF4B	Transamerica Partners Money Market ....	<input type="text"/> %
M15B	Transamerica Partners High Quality Bond	<input type="text"/> %
MF5B	Transamerica Partners Core Bond .....	<input type="text"/> %
M0DC	Transamerica Partners Inflation-Protected Securities .....	<input type="text"/> %
M26B	Transamerica Partners High Yield Bond ...	<input type="text"/> %
M14B	Transamerica Partners Balanced .....	<input type="text"/> %
MF6B	Transamerica Partners Large Value .....	<input type="text"/> %
M0AC	Transamerica Partners Large Core .....	<input type="text"/> %
M0FC	Transamerica Partners Stock Index ....	<input type="text"/> %
MF1A	Transamerica Partners Large Growth ....	<input type="text"/> %
M40B	Transamerica Partners Mid Value .....	<input type="text"/> %
M39B	Transamerica Partners Mid Growth .....	<input type="text"/> %
M41B	Transamerica Partners Small Value .....	<input type="text"/> %
M0BC	Transamerica Partners Small Core .....	<input type="text"/> %
M42B	Transamerica Partners Small Growth ....	<input type="text"/> %
M12B	Transamerica Partners International Equity	<input type="text"/> %

Roth IRA Contribution Amount (Per Pay Period)

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Current Contribution Amount: \_\_\_\_\_ \$ or % \_\_\_\_\_

Contribution Change Amount: \_\_\_\_\_ \$ or % \_\_\_\_\_

Section H. Signatures (continued)

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All investments involve risk, including loss of principal, and there is no guarantee of profits. Investments are not insured by any Transamerica company or guaranteed by the FDIC or any other government agency.

Signature of  
Account Holder

Date

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For Transamerica use only:

Signature of  
Registered Representative

Date

Printed Name of  
Registered Representative

Signature of  
Supervisory Principal

Date