SIMPLE IRA Contributions

Print Form

J.P.Morgan
Asset Management

Customer Service: 1-877-SMPLONE

Make check payable to J.P. Morgan Funds/DST Retirement Solutions PO Box 219099, Kansas City, MO 64121-9099 and include spreadsheet.

ICU Number 00-00000004 For pay period ending date (MMDDYYYY)

Plan identification number | Plan name

X_____ _____
Planned authorized signer | Date

Social Security Number	Participant Name	Elective Deferral Amount	Employer Matching Amount*	Employer Non-elective Amount*	Rollover Amount	Trustee Transfer Amount	Total Participant Contribution
Totals							

***The employer must elect to contribute either a matching or nonelective contribution annually by completing a new 5304 SIMPLE form. The employer may not contribute to both money types during the same year. All SIMPLE IRA contributions will be processed according to the instructions listed on this worksheet as provided by the plan sponsor or person(s) authorized by plan sponsor. The plan sponsor is responsible for ensuring that this contribution worksheet and related funding reconcile and that all above listed participants have completed and forwarded a J.P. Morgan Funds SIMPLE IRA Account Application with investment instructions. Contributions received for individuals not enrolled in the plan will be returned to the plan sponsor.**