How To: Fund My Account

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Fund My Account

The different ways you can fund your account is dependent on the account registration. See below for different methods based on the account type.

Traditional IRA, Rollover IRA, Roth IRA

Funding Sources and Requirements:

- ACH - Your bank account must be linked to your investment account. If this has not yet been setup, please follow the process How To: Add/Update My Banking Information before sending your request to us.
- Check - The check must be mailed to Charles Schwab & Co. to 1945 Northwestern Dr, El Paso, TX 79912. Make sure that your account number is notated on your check to avoid any processing delays.
- Wire
- Internal Transfer from another account

Simple IRA

Funding Sources and Requirements:

- ACH - Your employer MUST have a company account open in order for this to be eligible. You will need to discuss with your employer who will then need to reach out to us in order to fund your account this way.
- Check - A signed Simple IRA Transmittal form is required to be signed by the employer for each contribution. A check in the full amount of the contribution needs to be mailed to Schwab. On the check, make it payable to Charles Schwab & Co. Inc. and please note the SEP IRA account number on the memo line and endorse the back of the check. The transmittal form and check(s) should be mailed to Schwab at 1945 Northwestern Dr, El Paso, TX 79912. They will then process the contributions internally. Please send us copies of the checks and transmittals forms each time you mail this so we are able to add it to your file and follow-up on the progress of Schwab processing it.

SEP IRA

Funding Sources and Requirements:

- Check - A signed SEP IRA Transmittal form is required to be signed by the employer for each contribution. A check in the full amount of the contribution needs to be mailed to Schwab. On the check, make it payable to Charles Schwab & Co. Inc. and please note the SEP IRA account number on the memo line and endorse the back of the check . The transmittal form and check(s) should be mailed to Schwab at 1945 Northwestern Dr, El Paso, TX 79912. They will then process the contributions internally. Please send us copies of the checks and transmittals forms each time you mail this so we are able to add it to your file and follow-up on the progress of Schwab processing it.

Trust, Joint, Individual, UTMA/UGMA

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- Wire

- Internal Transfer from another account

Solo 401k/Roth 401k

Funding Sources and Requirements:

- ACH - Your bank account must be linked to your investment account. If this has not yet been setup, please follow the process How To: Add/Update My Banking Information before sending your request to us.
- Check - The check must be mailed to Charles Schwab & Co. to 1945 Northwestern Dr, El Paso, TX 79912 along with the signed Contribution Transmittal Form. Make sure that your account number is notated on your check to avoid any processing delays.
- Wire
- Internal Transfer from another account

Company Retirement Account (401k, Defined Benefit, Profit Sharing, Money Pension, etc.)

Funding Sources and Requirements:

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- Check - The check must be mailed to Charles Schwab & Co. to 1945 Northwestern Dr, El Paso, TX 79912 along with the signed Contribution Transmittal Form. Make sure that your account number is notated on your check to avoid any processing delays.
- Wire

If your account type is not listed or you are ready to fund your account, please reach out to us at clientsuccess@financialgravity.com for further assistance.

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