Question: **How do I add money to my account?**

Answer: It's easy.

- ☐ Depending on your account type, simply make your check payable to the name listed below (see chart).
- ☐ Remember to put your account number in the memo section of the check.
- ☐ If this is an IRA contribution, include the words "IRA Contribution" and what contribution year in the memo section of the check. (for example: IRA Contribution 2010)

Mail your check to our office at:

Beacon Financial Planning Services, Ltd.
15409 S. Route 59
Plainfield, IL 60544-2691

Type:	**Check payable to:**
Commonwealth Brokerage	NFS
Symmetry	NFS
SEI Private Trust Company	SEI Private Trust Company
Genworth Financial	Pershing, LLC FBO (Account Holders Name)

Directly held accounts:
If you have an account held directly with a mutual fund company like American Funds, Bright Directions, OppenheimerFunds, John Hancock, MFS, etc...

- ☐ Please check your quarterly or confirmation statements for how the check should be made payable.
- ☐ You may choose to mail the check to us for processing or send it directly to the fund company following the instructions they have provided on the statement. **Please be sure to always include your account number and an IRA contribution year in the memo section of the check.**

15409 S. Route 59, Plainfield, IL 60544-2691
Phone 815-577-0029 ~ Fax 815-439-6903 ~ www.BEACONFPSL.com