

SOLO 401K | INVESTMENT DEPOSIT FORM

Instructions

Use this form for making an investment-related deposit (e.g., real estate rental payment, note payment, dividend from LLC, etc.)

Solo 401k Name: _____ Participant Name: _____

Deposit for a note, real estate, or private investment

Name of Investment _____ Check #: _____

Payment Type

Amount

Rental property \$ _____

Note Payment \$ _____

Proceeds from sale of asset \$ _____

How many shares were sold/what percentage was sold _____

Dividends \$ _____

Other \$ _____

Payment Breakdown

Check one: Rental income Note Payment Other _____

If this is a note payment, complete the following:

Principal: \$ _____ Interest: \$ _____

Other (specify whether this is an overpayment, etc.): _____ \$ _____

New ending balance for note: \$ _____