



iPlanGroup

Delivery Instructions

iPlanGroup
28011 Clemens Road
Westlake, OH 44145
P: 440-484-5566
F: 440-815-2214
www.iplangroup.com

Check Payments & Physical Documents

Make Payable to: iPlanGroup FBO [Account Owner Name] [Account #]

*Please include ARN in the memo line for investment funds

Mail Payment to: iPlanGroup

28011 Clemens Road
Westlake, OH 44145

Wire/ACH Instructions:

Beneficiary/Destination Bank:

Key Bank

Address:

29900 Detroit Rd

City, State, Zip:

Westlake, OH 44145

Routing/ABA#:

041001039

Account Number:

35968138XXXX

*Please call iPlanGroup
to verify Wire/ACH instructions

Beneficiary Information:

IRA Plan Partners LLC - Client Funds

Reference/Addenda:

Account Holder Name, Account#

*include ARN for investment funds

***ARN: Asset Reference Number- contact iPlanGroup if you do not have the ARN**