

EVERGREEN WEALTH

How to Wire Funds to your Evergreen Wealth High Yield Checking Account

Your Evergreen Wealth High Yield Checking Account is your account used to receive or send funds to any of your Evergreen Wealth accounts, including Personal Portfolio. Wire transfers allow you to quickly transfer money between other financial institutions and Evergreen. Please note that some third-party intermediary banks may charge a fee for wire transfers. Consult with your sending bank for details.

Please note we are not able to accept wire transfers to or from your High Yield Savings.

For wire needs regarding an IRA, Direct or Indirect Rollover, please reach out to your Advisor or to the Client Service team for support via clientservice@evergreenwealth.com or reach us directly at (888) 884-0557.

Evergreen only accepts domestic U.S. Dollar wire transfers. The wire will be returned to the sender if sent **from an international financial institution or other currencies.**

Wire Instructions

Bank:	Coastal Community Bank (Who is this?)
Routing Number:	125109019
Account Number:	Your Evergreen Wealth High Yield Checking Account number (<i>found under High Yield Checking > Account Details > Account Number.</i>)
Beneficiary:	Your name as it appears on your Evergreen Account
Beneficiary address:	Your address associated with your account
Bank address:	5415 Evergreen Way, Everett, WA 98203
Memo line:	Enter as needed