



Instruction Sheet

IRA Simplifier Form

*Each new client must send a **copy of their valid driver's license** with the application. If the address on the driver's license does not match their street address listed on the application, they will also need to include a **copy of a utility bill** to open an account.

Section 1: Account Type

- Choose (TRADITIONAL, ROTH, SIMPLE, SEP, Beneficiary)

Section 2: Account Owner Information

- A physical (street) address is required. PO Boxes go on mailing address line.
- **Required Information: A, B, C, D** required to establish account.

Section 3: Account Contribution Information

- Mark transfer/deposit type and estimated dollar balance

Section 4: Designation of Beneficiary(s)

- It is highly recommended that each client designate at least a **Primary Beneficiary**
 - Please note that if the client is married and they do not choose to leave their spouse as 100% primary beneficiary, **the spouse will need to sign in spousal consent section.**
 - If the client chooses to leave a Family Trust as a beneficiary they will need to **include the cover page, first page, pages that explain what to do in the event of death and signature page of Trust documents.**

Section 5: Interested Party

- Optional – Used to grant authority to persons other than account holder.

Section 6: Fee Schedule

- Select Fee Schedule (**Flex or Basic**)
- Include Establishment Fee (**Due with the application**)
- Administration & Maintenance Fee: Client chooses how they pay on an ongoing basis. (Trust Administration Services bills' quarterly and annually)

Section 7: Account Holder Acknowledgment

- **Please Read**

Section 8: Accountholder Signature

- Sign and Date (**Original signature required; fax not acceptable**)

*If you have any questions about our forms, please call (800)-455-9472 Option 1 for the New Accounts Department.