

Please return this form by email to ROBS@irafinancial.com

A. CLIENT INFORMATION

Enter the information for all people who will be rolling over retirement funds to start the business.

FIRST NAME	MIDDLE NAME OR INITIAL	LAST NAME
STREET ADDRESS (MUST NOT BE A P.O BOX)		
CITY	STATE	ZIP CODE
BIRTH DATE	SOCIAL SECURITY NUMBER	HOME TELEPHONE
DAYTIME TELEPHONE	E-MAIL ADDRESS	

FIRST NAME	MIDDLE NAME OR INITIAL	LAST NAME
STREET ADDRESS (MUST NOT BE A P.O BOX)		
CITY	STATE	ZIP CODE
BIRTH DATE	SOCIAL SECURITY NUMBER	HOME TELEPHONE
DAYTIME TELEPHONE	E-MAIL ADDRESS	

B. ENTITY INFORMATION

***If you already have your C-Corporation formed, please send us a copy of the articles of incorporation and IRS EIN letter with your application and signed client agreement.**

Proposed C-Corporation Name:

Please fill out all fields.

NAME 1

NAME 2

NAME 3

STATE OF INCORPORATION	COUNTY OF INCORPORATION	REGISTERED AGENT OF INCORPORATION
REGISTERED AGENT ADDRESS		
MAILING ADDRESS OF CORPORATION		REGISTERED AGENT PHONE NUMBER
PRIMARY BUSINESS ACTIVITY THE C-CORP WILL ENGAGE IN		PHONE NUMBER OF CORPORATION

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C. CORPORATION INFORMATION

Officer(s) of the corporation:

PRESIDENT

VICE PRESIDENT

SECRETARY

TREASURER

DIRECTOR

DIRECTOR

D. 401(K) PLAN INFORMATION

Name of your new 401(k) plan:

(Plans are typically named the name of the business entity with the words "401(k) Trust" at the end.)

PLAN NAME

Trustee(s) of the 401(k) plan:

TRUSTEE

BIRTH DATE

SOCIAL SECURITY NUMBER

TRUSTEE

BIRTH DATE

SOCIAL SECURITY NUMBER

E. OTHER BUSINESSES

Do you own any other businesses? ☐ Yes ☐ No

If yes, how many W2 employees does the company employ (not including yourself or a spouse)? _____

Once you have provided the above information and signed Client Agreement, our ROBS specialists will begin working on your structure. We will be providing Corporate Filings and 401(k) plan documents, all of which will be sent electronically for your review.

It is vital that we maintain communication to ensure that we are aware of your progress during the structure set-up. Since you are endeavoring to start a business, we encourage you to consider the preparation of a business plan to outline your business goals, operating procedures, marketing plan and funding sources. As with all major decisions, please seek the appropriate counsel before acting.

If you have any questions, please contact our team at 800-472-0646 ext 2067 or via email at ROBS@irafinancial.com.