ROLLOVER FOR BUSINESS START-UP (ROBS)

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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IRAFinancial

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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.

www.irafinancialgroup.com | Phone: 800.472.0646 | Fax: 646.807.4534