

TRADITIONAL AND ROTH IRA

Use for Contributory, Rollover, Roth, and Inherited IRAs

Traditional and Roth Combo IRA Kit

SEP IRA

Traditional and Roth Combo IRA Kit

Attach 5305-SEP or similar

IRS Form 5305-SEP

SAR-SEP IRA

Traditional and Roth Combo IRA Kit

Attach 5305A-SEP or similar and proof that plan was originally established prior to 1997

IRS Form 5305A-SEP

SIMPLE IRA

Wedbush Employer SIMPLE IRA Kit

Wedbush Participant SIMPLE IRA Kit

Coverdell ESA

Forms are not available online for copyright reasons.

Please contact Retirement Services to have the Coverdell ESA Simplifier mailed to you.

INDIVIDUAL 401K/PS PLAN

Forms for the client to complete

Individual(k) Adoption agreement

Individual(k) EGTRRA Amendment

Plan Participant Beneficiary Designation

Plan Document and Disclosure Information

Correspondent Custodial Qualified Plan Account Agreement

Plan Document for Profit Sharing, Individual(k) and Money Purchase Plans

PROFIT SHARING PLAN

Forms for the client to complete

Profit Sharing Adoption agreement

Profit Sharing/Money Purchase EGTRRA Amendment

Plan Participant Beneficiary Designation

Plan Document and Disclosure Information

Correspondent Custodial Qualified Plan Account Agreement

Plan Document for Profit Sharing, Individual(k) and Money Purchase Plans

MONEY PURCHASE PENSION PLAN

Forms for the client to complete

Money Purchase Pension Adoption agreement

Profit Sharing/Money Purchase EGTRRA Amendment

Plan Participant Beneficiary Designation

Plan Document and Disclosure Information

Correspondent Custodial Qualified Plan Account Agreement

Plan Document for Profit Sharing, Individual(k) and Money Purchase Plans