

Simple IRA Instructions

Simple IRA Application:

- 1) Fill out Section 1 (Information about you)
- 2) Fill out Section 4 (Beneficiary Information)
- 3) Fill out Section 6 (Spousal Consent Signature) if applicable
- 4) Fill out Section 7 (Signature and Date)

Direct Account Form:

- 1) Fill out Section 2 (Primary Account Holder)
- 2) Fill out Section 4 (Suitability)
- 3) Fill out Section 5 (Additional Account Holders) if applicable
- 4) Fill out Section 7 (Account Agreement and Signature)
 - a. Initial in 2 Spots
 - b. Print, Sign and Date

A copy of your driver's license is required with all applications