ROLLOVER FOR BUSINESS START-UP (ROBS)

Please return this form by e-mail to your IRA Financial Group representative.

A. CLIENT INFORMATION

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

B. ENTITY INFORMATION

Do you already have a C-Corporation?

◯ Yes (complete section B1) ◯ No (complete section B2)

B1.

NAME OF "C" CORPORATION	FEDERAL TAX ID#

Please provide copies of the Articles of Incorporation and IRS EIN Letter for your "C" Corporation.

ADDRESS OF CORPORATION	PHONE NUMBER OF CORPORATION

B2.

Proposed "C" Corporation Name:

NAME 1		
NAME 2		
NAME 3		
STATE OF INCORPORATION	COUNTY OF INCORPORATION	REGISTERED AGENT OF CORPORATION
ADDRESS OF CORPORATION		
TYPE OF BUSINESS		PHONE NUMBER OF CORPORATION

1691 Michigan Ave., Suite # 415 | Miami Beach, Fl 33139 | www.irafinancialgroup.com | Phone: 800.IRA.0646 | Fax: 646.807.4534

C. CORPORATE INFORMATION

Officer(s) of the Corporation

PRESIDENT
VICE PRESIDENT
SECRETARY
TREASURER
DIRECTOR
DIRECTOR
IF YOU HAVE ADDITIONAL DIRECTORS, ADD THEM HERE

D. 401(K) PLAN INFORMATION

Name of your new 401(k) Plan:
(typically use the name of the business entity with the words “401K Trust” at the end.)

PLAN NAME

Who will serve as trustee(s) of the 401(k) plan:

TRUSTEE
TRUSTEE
IF YOU HAVE ADDITIONAL TRUSTEES, ADD THEM HERE

Once you have provided the above information and signed Client Agreement, our Compliance team 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 or via email at info@irafinancialgroup.com.

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