IRA FINANCIAL

Solo 401(k) Professional Services

IRA Financial Group agrees to perform the following services (the “Professional Services”) required for the Solo 401(k):

- Establishment of IRS approved Self-Directed Solo 401(k) Plan
- Free Solo 401(k) Plan tax consultation
- IRS Opinion Letter
- Adoption Agreement
- Basic Plan Document
- Summary Plan Description
- Trust Agreement
- Appointment of Trustee
- Beneficiary Designation
- Loan Procedure
- Loan Promissory Note
- Application for plan trust EIN
- Assistance with tax-free rollover of funds to Solo 401(k) Plan
- Assistance with opening the Solo 401(k) Plan Trust bank account
- Free Solo 401(k) Plan tax support
- Free tax consultation on the UBTI and UDFI rules
- Free tax consultation of "Disqualified Person" and "Prohibited Transaction" Rules
- Free tax consultation with in-house tax specialists on IRS Form 5500.
- IRS audit support

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