



Rollover for Business Start-Up Professional Services

IRA Financial Group agrees to perform the following services (the “Professional Services”) required for the ROBS solution:

- Establishment of (1) one Corporation including Filing Fees
- Filing Corporate Articles of Incorporation with the state
- Application for Corporation EIN
- Generating all required initial corporate resolutions and minutes
- Generating required Stock Purchase Agreement
- Generating required Employee Stock Purchase Agreement
- Free consultation with in-house tax professional on the ROBS
- Adoption of 401(k) Plan
- Basic Plan Document
- Summary Plan Description
- Trust Agreement
- Appointment of Trustee
- Beneficiary Designation
- Application for Plan trust EIN
- Assistance in the establishment of business and Plan bank accounts
- Assistance with the transfer of funds to your new 401(k) Plan bank account
- Tax and ERISA support on the ROBS and the 401(k) Plan
- Access to tax specialists on matters involving IRS Form 5500
- Audit support regarding the legality of the ROBS