IRAFinancial

ROLLOVER FOR BUSINESS START-UP (ROBS)

Please return this form by e-mail to ROBS@irafinancial.com

☐ **Check this box if you'd like expedited services (an additional fee of $200 will apply)**

A. CLIENT INFORMATION

FIRST NAME | MIDDLE NAME OR INITIAL | LAST NAME

STREET ADDRESS (MUST NOT BE A P.O. BOX)

CITY | STATE | ZIP CODE

BIRTHDATE | 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.

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

NAME OF "C" CORPORATION | FEDERAL TAX ID#

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 # 335 | Miami Beach, Fl 33139 | www.irafinancialgroup.com | Phone: 800.472.0646 | Fax: 646.807.4534

C. CORPORATION INFORMATION

Officer(s) of the corporation:

PRESIDENT

VICE PRESIDENT

SECRETARY

TREASURER

DIRECTOR

DIRECTOR

D. 401(K) PLAN INFORMATION

Name of your new 401(k) plan:
(Plans are typically named the name of the business entity with the words "401(k) Trust" at the end.)

PLAN NAME

Trustee(s) of the 401(k) plan:

TRUSTEE

TRUSTEE

E. OTHER BUSINESSES

Do you own any other businesses? ☐ **Yes** ☐ **No**

If yes, how many W2 employees does the company employ (not including yourself)? ___________

Once you have provided the above information and signed Client Agreement, our ROBS specialists 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 ext 2067 or via email at ROBS@irafinancial.com.

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