TRADITIONAL AND ROTH IRA
Use for Contributory, Rollover, Roth, and Inherited IRAs
Traditional and Roth Combo IRA Kit

SEP IRA
Traditional and Roth Combo IRA Kit
Attach 5305-SEP or similar
IRS Form 5305-SEP

SAR-SEP IRA
Traditional and Roth Combo IRA Kit
Attach 5305A-SEP or similar and proof that plan was originally established prior to 1997
IRS Form 5305A-SEP

SIMPLE IRA
Wedbush Employer SIMPLE IRA Kit
Wedbush Participant SIMPLE IRA Kit

Coverdell ESA
Forms are not available online for copyright reasons.
Please contact Retirement Services to have the Coverdell ESA Simplifier mailed to you.

INDIVIDUAL 401K/PS PLAN
Forms for the client to complete
Individual(k) Adoption agreement
Individual(k) EGTRRA Amendment
Plan Participant Beneficiary Designation

Plan Document and Disclosure Information
Correspondent Custodial Qualified Plan Account Agreement
Plan Document for Profit Sharing, Individual(k) and Money Purchase Plans

PROFIT SHARING PLAN
Forms for the client to complete
Profit Sharing Adoption agreement
Profit Sharing/Money Purchase EGTRRA Amendment
Plan Participant Beneficiary Designation
MONEY PURCHASE PENSION PLAN

Forms for the client to complete

Money Purchase Pension Adoption agreement
Profit Sharing/Money Purchase EGTRRA Amendment
Plan Participant Beneficiary Designation

Plan Document and Disclosure Information

Correspondent Custodial Qualified Plan Account Agreement
Plan Document for Profit Sharing, Individual(k) and Money Purchase Plans