FormSystem™ Software

Windows® Based Forms Completion Software

CWF has developed comprehensive software products
to allow a financial institution to establish and administer
IRAs, CESAs, HSAs, and other tax-preferred accounts.

More and more financial institutions are using electronic plan agreements and administrative forms. Doing so:

- **Eliminates the headaches of maintaining inventories of print forms;**
- **More specialty forms are available;**
- **When the forms need to be revised as a result of a law or regulatory change, such edits are easily implemented; and**
- **Timely updates are furnished via the internet to ensure that your institution has the most current forms and is in compliance with IRS requirements and the requirements of other regulations.**

Our FormSystem™ software is an excellent product furnishing you the tools to be compliant. All administrative topics are covered – opening an account, beneficiary designations, truth-in-savings, contributions, rollovers, distributions, excess contributions, recharacterizations, substantially equal periodic payments, required distributions, transfers, etc.

You are authorized to use the CWF software on an unlimited number of computers, and you are allowed an unlimited number of users.

Forms are selected from this simple screen.

The System Administrator can define specific forms employees will have access to.

The FormSystem™ is supported by all versions of Windows and other network operating systems. The system can be installed on LAN and WAN systems, and even allows for custom installations on WAN systems to maintain operational speed and data integrity.

Interfaces can optionally be accepted from and directed to virtually any host system. All interfaces are customized and will be quoted on an individual basis.

Be certain your personnel have the forms needed to properly service

IRA FormSystem™ Software

Windows® Based IRA FormSystem™

CWF's IRA FormSystem™ software contains more than 200 essential and specialty forms for Traditional IRA, Roth IRA, SEP, SIMPLE, and CESA. An HSA FormSystem is also available.

The system maintains full retention of the information which is entered.

The user can create a template for every form, for more efficient use. Default values for every field on every form can be maintained.

The IRA FormSystem™ also performs basic compliance checking at entry time to help ensure that forms are completed correctly the first time. Data from your host system can optionally be downloaded to the FormSystem™ to eliminate the re-entry of information.

Create reports summarizing the forms created, categorized by user, form, or customer with IRA FormSystem™.

Optionally Interfaces can be accepted from and directed to virtually any host system. All interfaces are customized and will be quoted on an individual basis.

The FormSystem™ is supported by all versions of Windows and other network operating systems.

View entire completed form before printing.

Annual IRA Software Fee .... $495 + 45¢ per account

Example: 400 IRAs $495 + 45¢ x 400 ($180) = $675

Please complete this form and FAX to 1-800-211-0760 or call for more information at 1-800-346-3961

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☐ **Yes! I am interested in purchasing a license to use CWF's IRA FormSystem™**

Name _____   Title _____

Institution/Organization _____   Phone _____

Address _____   Fax _____

City/State/Zip _____   e-mail _____