Current Forms with Revision Dates as of September 29, 2017

Form #	Rev Date	Form Titles
31	8/13	IRA Disclosures Statement - Financial Projection Information
31A	12/02	IRA Disclosures Statement - Financial Projection Information
31B	5/5	IRA Disclosures Statement - Financial Projection Information
32	11/2	IRA Disclosures Statement - Individualized Financial Projection
36	8/13	Change of Name, Address or Beneficiary to IRA Account
36A	8/13	Change of Name, Address or Beneficiary to IRA Account
36R	8/13	Change of Name, Address or Beneficiary to Roth Account
36RA	8/13	Change of Name, Address or Beneficiary to Roth IRA Account
39	10/11	State of Iowa Withholding Form
39MA	1/14	State of Massachusetts Withholding Form
39MI	12/11	Income Tax Withholding Worksheet for Michigan IRA Distributions
40E	6/16	Coverdell Education Savings Account (ESA) - Custodial Account Application
40R	1/17	Roth IRA - Custodial Account Application
40RI	1/16	Inherited Roth IRA - Custodial Account Application
40T	1/17	IRA - Custodial Account Application
40TI	1/16	Inherited IRA - Custodial Account Application
40TIUBT	1/12	IRA - Custodial Account Application UBT
40TU	2/12	Special IRA Financial Disclosure Addendum for United Bank of Iowa
41E	6/16	Coverdell Education Savings Account (ESA) - Trust Account Application
41R	3/17	Roth IRA - Trust Account Application
41RI	1/16	Inherited Roth IRA - Trust Account Application
41T	3/17	IRA - Trust Account Application
41TV2	3/17	IRA - Trust Account Application - Version 2
41TI	1/16	Inherited IRA - Trust Account Application
42E	2/13	Coverdell Education Savings Account (ESA)
42R	3/17	Roth IRA - Custodian Self-Directed Account Application
42RI	1/16	Inherited Roth IRA - Self-Directed Custodial Account Application
42T	3/17	IRA - Self-Directed Custodial Account Application
42TI	1/16	Inherited IRA - Self-Directed Custodial Account Application
44E	12/11	Coverdell ESA - Change in Designated Beneficiary
54	11/16	Traditional IRA, SEP & SIMPLE-IRA - Contribution Form
54A	11/16	IRA Contribution
54B	11/16	Traditional IRA, SEP IRA & SIMPLE-IRA - Contribution Form
54C	11/16	Periodic IRA Contribution Instruction

54E	3/13	Coverdell Education Savings Account (Coverdell ESA) Contribution Form
54EDB	1/17	CESA Notification Form – Age 18
54ESD	3/13	Coverdell Education Savings Account (Coverdell ESA) Trust or Self-Directed Contribution Form
54PD	11/12	Payroll-Deduction Instruction Form
54R	11/16	Roth IRA - Contribution Form
54RB	11/16	Roth IRA - Contribution Form
54RSD	11/16	Roth IRA - Trust/Self-Directed Contribution Form
54S10	2/05	Policy Statement for Self-Directed Retirement Accounts
54S11	2/05	Initial Self-Directed Investment Instruction Form
54SD1	8/13	Trust or Self-Directed IRA Change of Investment & Direction Form
54SD2	8/07	Investment Instruction Form for a Self-Directed IRA
54SD	11/16	IRA - Trust/Self-Directed Contribution Form
54TR1	4/16	Notice of Internal Recharacterization of IRA Contribution
54TR2	4/16	Notice of External Recharacterization of IRA Contribution
55	8/07	Establishing a Substantially Equal Periodic Distribution Schedule
55C	10/13	Special Election Under Revenue Ruling 2002-62 Changing a Substantially Equal Periodic Payment Schedule
56	6/17	IRA Transfer Form
56E	8/13	Instruction & Authorization to Transfer Coverdell ESA Funds
56H	8/13	Certification for One Lifetime Transfer of IRA Funds to an HSA A Qualified HSA Funding Distribution
56I	7/14	Instruction & Authorization to Transfer Inherited IRA Funds
56QTP	2/15	Instruction & Authorization to Transfer Coverdell ESA Funds to a Qualified Tuition Program (a section 529 plan)
56R	7/14	Instruction & Authorization to Transfer Roth IRA Funds
56RI	7/14	Instruction & Authorization to Transfer Inherited Roth IRA Funds
56RSB	7/14	Instruction by a Spouse Beneficiary to Treat Deceased Spouse’s Roth IRA as His or Her
56RSD1	7/14	Own Roth IRA and Then Transfer Roth IRA Funds to Another Roth IRA
56RSD2	9/12	Instruction & Authorization to Transfer Roth IRA Funds to Another Roth IRA
56SB	7/14	Instruction by a Spouse Beneficiary to Treat Deceased Spouse’s IRA as His or Her
56SD1	7/14	Own IRA and Then Transfer Traditional IRA Funds to Another Traditional IRA
56SD2	7/14	Instruction & Authorization to Transfer Traditional IRA Funds to Another Traditional IRA
56TR1	2/16	Instruction to Convert, via Transfer, IRA Funds to a Roth IRA
56TR2	2.16	Instruction to Convert, via Transfer, IRA Funds to a Roth IRA
56TREX	11/13	Special Explanation to Accountholder for an IRA Recharacterization for the 2017 Tax year
56TRX	1/10	Special Explanation to Accountholder for an IRA Recharacterization for the 2016 Tax year
56TX	10/09	Special Explanation to Accountholder for an IRA Recharacterization for the 2015 Tax year
57	9/17	IRA Distribution Form
57C	8/16	Certification of Tax-Free Charitable Distribution from a Traditional / Roth IRA
57CE	3/13	Coverdell ESA Distribution Form

57D	9/05	Certification of Disability for Traditional and Roth IRAs
57DE	3/13	Certification of Disability for Coverdell ESAs
57E	2/17	Coverdell ESA Distribution Form
57ESD	2/17	Coverdell ESA Self-Directed or Trust Distribution Form
57FOR	2/16	Foreign Payee IRA Distribution Form
57ME	12/16	Distribution Form - ME
57R	2/15	Roth IRA Distribution Form
57RIA	2/14	Roth IRA Distribution Acknowlegment By a Nonspouse Beneficiary
57RSD	2/15	Roth IRA Self-Directed or Trust Distribution Form
57SD	12/16	IRA Self-Directed or Trust Distribution Form
57ST	12/16	IRA Distribution Form
58SD1	8/07	Direction of Investment - IRA
58SD2	8/07	IRA Self-Directed Instruction for Investment
58SD3	10/10	IRA Self-Directed Instruction for Investment
59	10/16	Withholding Certificate for IRA Payments Payable Upon Demand and Annual Reminder Notice
59A	10/16	Withholding Certificate for IRA Payments Upon Demand
59B	10/16	Reminder Notice - Withholding Election for Automatic IRA Distributions
59C	10/16	Reminder Notice - Withholding Election for Periodic IRA Distributions
59D	10/16	Withholding Certification for IRA Payments Payable Upon Demand and Annual Reminder Notice
59F	10/16	Withholding Certification for IRA Payments Payable Upon Demand and Annual Reminder Notice
61	9/07	IRA Beneficiary Designation
61A	8/13	IRA Beneficiary Designation
61B	8/13	IRA Beneficiary Designation
61D	12/13	IRA Beneficiary Designation
61E	8/13	Coverdell ESA - Change in Designated Beneficiary
61F	10/13	IRA Beneficiary Designation
61G	9/14	IRA Beneficiary Designation (3 Beneficiaries 33.33% each)
61H	6/15	IRA Beneficiary Designation (Restrictions)
61I	8/08	IRA Beneficiary Designation by an Inheriting or Successor Beneficiary
61J1	1/16	IRA Beneficiary Form
61J2	1/16	IRA Beneficiary Form
61K	6/16	IRA Beneficiary Designation
61NSR	4/17	IRA Beneficiary Designation Distribution Restrictions for Spouse who is not Sole Beneficiary, or Non-Spouse Beneficiary
61R	9/07	Roth IRA Beneficiary Designation
61RA	6/02	Roth IRA Beneficiary Designation
61RB	8/08	Roth IRA Beneficiary Designation
61RI	8/08	Roth IRA Beneficiary Designation by an Inheriting or Successor Beneficiary

61SR	4/17	IRA Beneficiary Designation With Possible Restrictions for Spouse, Who is Sole Primary Beneficiary
62-1	9/17	Required Distribution Notice for 2018
62-2	9/17	Required Distribution Notice for 2018
62-3	9/17	Required Distribution Notice for 2018
62-4	9/17	Required Distribution Notice for 2018
62-5A	9/17	Required Distribution Notice for 2018
62-5B	9/17	Required Distribution Notice for 2018
62-6	9/17	Required Distribution Notice for 2018
62-7	9/17	Required Distribution Notice for 2018 for an IRA Beneficiary
62-8	9/17	Required Distribution Notice for 2018 for an IRA Beneficiary
62E	5/05	Coverdell ESA - Naming an Inheriting Designated Beneficiary
63	12/10	Periodic Payment Instruction for Distributions
63AE	12/10	Coverdell ESA - Designation of Successor Responsible Individual
63BE	5/08	Coverdell ESA - Change in Responsible Individual
63DBE	12/12	Coverdell ESA - Change in Responsible Individual
63E	12/10	Coverdell ESA - Change in Responsible Individual
64	12/16	Periodic Payment Instruction for Accountholders 70½ and older
65	5/16	IRA - Certification for Rollovers or Direct Rollovers to an IRA
65C	8/16	Certificationi for Late Rollover Contribution
65AD	12/16	IRA Adviser Rollover Checklist
65AP	12/14	Special Roth IRA Rollover Certification Form - For Certain Airline Payments
65E	12/14	Coverdell ESA - Certification for Rollovers to a Coverdell ESA
65EV	7/9	Special Rollover Certification Form - For Exxon Valdez Settlement Income
65HK	9/06	Special Repayment/Rollover Certification Form - for Use by Individuals in the Three Hurricane Disaster Zones
65ID	12/16	The Individuals Rollover Determination Form
65MDG	12/14	Special Roth IRA Certification Form - for Military Death Graduities and Service members' Group Life Insurance (SGLI) Payments
65MW	7/09	Special Repayment/Rollover Certification Form - for User by Individuals in the Midwestern Disaster Area
65R1	4/14	IRA - Certification for the Internal Conversion of a Traditional IRA to a Roth IRA
65R2	7/14	Certification for Rollovers and Direct Rollovers to a Roth IRA From Another Roth IRA or Roth 401(k)/403(b)
65R3	4/14	Roth IRA - Certification for the Conversion of Non-Roth Funds Within a 401(k)/403(b)/457 Plan to a Roth IRA
65R4	4/14	Certification and Instruction for the Conversion of a Traditional IRA at One Financial Institution to a Roth IRA at a Different Financial Institution
65R5	4/14	IRA - Certification for the Internal Conversion of a SIMPLE-IRA to a Roth IRA
65R6	4/14	IRA - Certification and Instruction for the External Conversion of a SIMPLE-IRA to a Roth IRA
65W	3/06	Conduit IRA - Waiver Form
64WR	12/14	Determination of Eligibility to Use the Automatic Waiver of the 60-Day Rollover Rule
66	12/16	Direct Rollover Request Form
66I	5/07	Direct Rollover Request - By Inheriting Beneficiary of Qualified Plan Funds

66JA	2/14	Direct Rollover Joint Agreementf
66R	5/08	Direct Rollover Request Form for a Designated Roth Account
67-2011	8/10	Special Explanation Regarding the Withdrawal of a 2011 "Current Year" Contribution
67	9/17	Special Explanation Regarding the Withdrawal of a 2018 "Current Year" Traditonal IRAContribution
67A	9/17	Special Explanation Regarding the Withdrawal of a 2017 "Current-Year" Traditional IRA Contribution
67B	9/17	Special Explanation Regarding the Withdrawal of a 2016 "Current Year" Traditional IRA Contribution
67E	11/16	The Withdrawal of a 2017 Excess Contribution from a Coverdell Education Savings Account (CESA)
67EA	8/15	The Withdrawal of a 2016 Excess Contribution from a Coverdell Education Savings Account (CESA)
67EB	8/15	The Withdrawal of a 2015 Excess Contribution from a Coverdell Education Savings Account (CESA)
67R	11/16	Special Explanation Regarding the Withdrawal of a 2017 "Current-Year" Roth IRA Contribution
67RA	9/14	Special Explanation Regarding the Withdrawal of a 2016 "Current-Year" Roth IRA Contribution
67RB	3/13	Special Explanation Regarding the Withdrawal of a 2015 "Current-Year" Roth IRA Contribution
67W2A	6/03	Worksheet to Calculate the Income Related to a Recharacterized Contribution
67W-1	6/03	Worksheet to Calculate the Income Related to the Withdrawal of a Current-year Contribution(s)
67W-2	2/01	Worksheet to Calculate the Income Related to the Withdrawal of a Current-year Contribution(s)
67WC	8/13	Worksheet to Calculate the Income Related to the Withdrawal of a Current-year Contribution(s)
67WR	8/13	Worksheet to Calculate the Income Related to a Recharacterized Contribution
68	8/13	Transfer of IRA Funds - From Deceased Accountholder to Beneficiary
68R	8/13	Transfer of Roth IRA Funds - From Deceased Accountholder to Beneficiary
69	8/13	Special Instruction Rollover from an IRA to a Qualified Plan, 403(b) Plan or Section 457(b) Plan
79E	8/13	Coverdell Education Savings Account Amendment
80	6/05	Automatic Rollover Agreement
80A	6/05	Automatic Rollover Agreement
81	3/05	Savings Account - Variable Interest Rate for Automatic Rollover IRA
82	3/05	Money Market Deposit Account for an Automatic Rollover IRA
204	9/17	Beneficiary's Distribution Notice and Certification Form and Payment Instruction
204A	12/10	Successor Beneficiary's Distribution Notice & Certification Form & Payment Instruction
204R	12/11	Roth IRA Beneficiary's Distribution Election and Certification Form and Payment Instruction
204RA	12/12	Successor Beneficiary's Distribution Notice & Certification Form & Payment Instruction
205	8/13	Inherited IRA Accountholder's Distribution Instruction and Certification to Comply with RMD Rules
205R	3/8	Inherited Roth IRA Accountholder's Distribution Instruction and Certification to Comply with RMD Rules
306	5/02	Worksheet to Calculate the Required Minimum Distribution (RMD)
307	7/14	Customer Notice and Determination of Customer's Identity
312	9/11	Certification - Election to Use the Alternative Method for Required Minimum IRA Distributions
330	5/00	Standard Checking Account
340	2/04	Savings Account - Fixed Interest Rate
341	2/04	Savings Account - Variable Interest Rate

341E	2/12	Savings Account - Variable Interest Rate
342	2/04	Money Market Deposit Account
343	2/04	Time Deposit - Fixed Interest Rate
343A	5/08	Time Deposit - Fixed Interest Rate
343B	5/10	Time Deposit - Fixed Interest Rate
343D	5/08	Time Certificate of Deposit
343D	2/12	Time Deposit - Fixed Interest Rate
343E	9/13	Time Deposit - Fixed Interest Rate
344	2/04	Time Deposit - Variable Interest Rate
345	2/04	Time Deposit - Stepped Fixed Interest Rate
346	2/04	Time Deposit - Tiered Fixed Interest Rate
347	2/04	Money Market Deposit - Tiered Account
348	2/04	Money Market Deposit - Tiered Account II
348A	9/05	Money Market Deposit - Tiered Account II
350	5/08	Standard Checking Account
350A	6/08	Checking Account - Interest Bearing
350B	7/07	Checking Account - Tiered Interest
350C	7/07	Checking Account - Tiered Interest
351	2/04	NOW Account
360	5/00	Notice of Change in Terms Savings Account - Fixed Interest Rate
361	5/00	Notice of Change in Terms Savings Account - Variable Interest Rate
363	5/00	Notice of Change in Terms Money Market Deposit Account
364	5/00	Notice of Change in Terms Time Deposit - Variable Interest Rate
365	5/00	Notice of Change in Terms Time Deposit - Stepped Fixed Interest Rate
366	5/00	Notice of Change in Terms Time Deposit - Tiered Fixed Interest Rate
367	5/00	Notice of Change in Terms Money Market Tiered Account
368	5/00	Notice of Change in Terms Money Market Deposit - Tiered Account II
370	5/00	Standard Checking Account
371	5/00	Notice of Change in Terms NOW Account
380	5/00	Notice of Maturity - Does Not Automatically Renew Time Deposit - (More than one Year)
383	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Fixed Interest Rate (More than One year)
384	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Variable Interest Rate (More than One year)
385	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Stepped Fixed Interest Rate (More than One Year)
386	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Tiered Fixed Interest Rate (More than One Year)
393	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Fixed Interest Rate (One Year or less)
394	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Variable Interest Rate (One Year or Less)
395	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Stepped Fixed Interest Rate (One year or less)

396	5/00	Notice of Maturity - Automatically Renewable Time Deposit - Tiered Fixed Interest Rate (One year or less)
700	2/05	Simplified Employee Pension - Individual Retirement Accounts Contribution Agreement
701	6/06	Salary reduction Simplified Employee Pension - Individual Retirement Accounts Contribution Agreement
826	3/03	Notice and Explanation of Qualified Joint and Survivor Annuity and Waive Provisions
854	10/02	Qualified Plan Contribution Form
857A	12/14	Qualified Plan, Including 401(k) Plans, Distribution Notice/Election Form - Participant
857B	12/14	Qualified Plan, Including 401(k) Plans, Distribution Notice/Election Form - Surviving Spouse Beneficiary
857C	12/14	Qualified Plan, Including 401(k) Plans, Distribution Notice/Election Form - Non-Spouse Beneficiary
917A	6/12	Savings Incentive Match Plan for Employees of Small Employers (SIMPLE) for use With a Designated Financial Institution
917B	6/12	Savings Incentive Match Plan for Employees of Small Employers (SIMPLE) Not for use with a designated Financial Institution
918A	8/17	SIMPLE Summary Description for the 2018 Calendar Year - 5305-SIMPLE
918B	8/17	SIMPLE Summary Description for the 2018 Calendar Year - 5304-SIMPLE
918C	8/17	SIMPLE Summary Description for the 2018 Calendar Year - Alternative Method)
918D	10/16	SIMPLE Summary Description for the 2017 Calendar Year - 5305-SIMPLE
918E	10/16	SIMPLE Summary Description for the 2017 Calendar Year - 5304-SIMPLE
918F	10/16	SIMPLE Summary Description for the 2017 Calendar Year - Alternative Method)
919A	8/8	A Service Agreement Formal Statement of Relationship Between a Financial Institution and a Business Customer with a SIMPLE-IRA Plan
919B	8/08	A Service Agreement Formal Statement of Relationship Between a Financial Institution and a Business Customer with a SIMPLE-IRA Plan
920	10/15	SIMPLE - Employee Eligibility SIMPLE-IRA Worksheet
920-1	4/97	SIMPLE - Payroll/Contribution Report
921	9/11	SIMPLE - Payroll/Contribution Report
940	01/16	SIMPLE-IRA Custodial Account Application Form 5305-SA
941	01/16	SIMPLE IRA - Trust Account Application Form 5305-S
942	01/16	SIMPLE-IRA - Self-Directed Custodial Account Application Form 5350-SA
950	11/11	Notice of Intent to Terminate SIMPLE-IRA Plan
956	9/11	Instruction & Authorization to Transfer SIMPLE-IRA Funds to Another SIMPLE-IRA or Traditional IRA
965	1/16	SIMPLE-IRA - Certification for a Rollover to a SIMPLE-IRA from Another SIMPLE-IRA
970A	8/17	SIMPLE - For 2018 Salary Reduction Contribution Instructions, Instruction Regarding Transfers, and Acknowledgment of Receipt of Notice of Withdrawal and F
970B	8/17	SIMPLE - For 2018 Salary Reduction Contribution Instructions and Acknowledgement of Receipt of Notice of Withdrawal and Rollover Rights
970C	7/16	SIMPLE - For 2017 Salary Reduction Contribution Instructions and Acknowledgement of Receipt of Notice of Withdrawal and Rollover Rights
970D	7/16	SIMPLE - For 2017 Salary Reduction Contribution Instructions and Acknowledgement of Receipt of Notice of Withdrawal and Rollover Rights
CIP		The Customer Identification Program With Respect to IRAs and Other Tax Preferred Accounts
Kit5304	6/12	SIMPLE Starter Kit: Contents & Instructions
Kit5305	6/12	SIMPLE Starter Kit: Contents & Instructions

Health Savings Accounts

Form #	Rev Date	Form Titles
HSA36	7/06	Change of Name, Address or Beneficiary to HSA Account
HSA40	5/17	HSA - Custodial Account Application
HSA40A	5/07	HSA Beneficiary Designation
HSA41	5/16	HSA - Trust Account Application
HSA42	5/16	HSA - Self-Directed Custodial Account Application
HSA43	11/10	Designation of Power of Attorney for HSA Transactions
HSA44	11/10	Revocation of Power of Attorney for HSA Transactions
HSA54	5/16	HSA Contribution Form
HSA54A	2/15	HSA Contribution Form
HSA54ER	1/15	HSA - Payroll/Contribution Report
HSA54SD1	3/07	Trust or Self-Directed HSA Change of Investment & Direction Form
HSA54SD	5/16	HSA - Self-Directed or Trust Contribution Form
HSA56	3/12	HSA - Instruction & Authorization to Transfer Funds
HSA56H	7/11	Certification of One Lifetime Transfer of IRA Funds to an HSA
HSA57	6/13	HSA - Distribution Form
HSA57D	4/12	Certification of Disability for HSAs
HSA57SD	2/16	HSA Self-Directed or Trust Distribution Form
HSA64	4/12	HSA - Certification of Mistaken HSA Distributions
HSA65	12/14	HSA - Certification for Rollovers to an HSA
HSA66	5/16	Certification for One Lifetime Transfer of IRA Funds to an HSA
HSA66A	1/11	Certification for One Lifetime Transfer of FSA Funds to an HSA
HSA66B	1/11	Certification for One Lifetime Rollover of Terminated HRA Funds to an HSA
HSA67	4/17	HSA - Special Explanation Regarding the Withdrawal of an Excess HSA Contribution for 2017
HSA67A	4/17	HSA - Special Explanation Regarding the Withdrawal of an Excess HSA Contribution for 2016
HSA67B	8/15	HSA - Special Explanation Regarding the Withdrawal of an Excess HSA Contribution for 2015
HSA67W	2/14	Worksheet to Calculate the Income Related to the Withdrawal of an Excess HSA Contribution
HSA204	8/17	HSA Beneficiary’s Distribution Notice, Certification and Payment Instruction