

Traditional IRA Forms

	CWF 31 (12/02) - IRA Disclosure Statement - Financial Projection Information
	CWF 31A (12/02) - IRA Disclosure Statement - Financial Projection Information
	CWF 31B (05/05) - IRA Disclosure Statement - Financial Projection Informatio
	CWF 32 (11/02) - IRA Disclosure Statement - Individualized Financial Projection
	CWF 36A (3/99) - Change of Name, Address or Beneficiary to IRA Account
	CWF 36 (9/99) - Change of Name, Address or Beneficiary to IRA Account
	CWF 39 (8/07) - State of Iowa Withholding Notice
	CWF 40T (11/07) - IRA - Custodial Account Application - Form 5305-A
	CWF 40TI (2/08) - Inherited IRA - Custodial Account Application - Form 5305-A
	CWF 41T (11/07) - IRA - Trust Account Application - Form 5305
	CWF 41TI (2/08) - Inherited IRA - Trust Account Application - Form 5305
	CWF 42T (11/07) - IRA - Self-Directed Custodial Account Application - Form 5305-A
	CWF 42TI (2/08) - Inherited IRA - Custodial Account Application - Form 5305-A
	CWF 54 (1/08) - IRA & SIMPLE-IRA - Contribution Form
	CWF 54A (11/05) - IRA Contribution
	CWF 54B (1/08) - IRA & SIMPLE-IRA - Contribution Form
	CWF 54C (8/07) - Periodic IRA Contribution Instruction
	CWF 54PD (5/07) - Payroll-Deduction Instruction Form
	CWF 54SD (2/07) - IRA - Trust/Self-Directed Contribution Form
	CWF 54SD1 (12/01) - Trust or Self-Directed IRA Change of Investment & Direction Form
	CWF 54SD2 (8/07) - Investment Instruction Form for a Self-Directed IRA
	CWF 54SD10 (2/05) - Policy Statement for Self-Directed Retirement Accounts
	CWF 54SD11 (2/05) - Initial Self-Directed Investment Instruction Form
	CWF 54TR1 (4/06) - Notice of Internal Recharacterization of IRA Contribution
	CWF 54TR2 (4/06) - Notice of External Recharacterization of IRA Contribution
	CWF 55 (8/07) - Establishing a Substantially Equal Periodic Distribution Schedule
	CWF 55C (10/04) - Special Election Under Revenue Ruling 2002-62
	CWF 56 (9/04) - Instruction & Authorization to Transfer Traditional IRA Funds to Another Traditional IRA
	CWF 56I (8/04) - Instructions & Authorization to Transfer Inherited IRA Funds
	CWF 56TR (3/07) - Instruction to Convert, via Transfer, Traditional IRA Funds to a Roth IRA
	CWF 56TRES (2/07) - Special Explanation to Accountholder for an IRA Recharacterization for the 2007 Tax Year
	CWF 56TRES (8/07) - Special Explanation to Accountholder for an IRA Recharacterization for the 2008 Tax Year
	CWF 57 (12/07) - IRA Distribution Form
	CWF 57C (3/07) - Certification for Tax-Free Charitable Distribution from a Traditional/Roth IRA
	CWF 57D (9/05) - Certification of Disability for Traditional and Roth IRAs
	CWF 57SD (3/07) - IRA Self-Directed or Trust Distribution Form
	CWF 57ST (3/07) - IRA Distribution Form
	CWF 58SD1 (8/07) - Direction of Investment - IRA
	CWF 58SD2 (8/07) - IRA Self-Directed Instruction for Investment
	CWF 59 (3/06) - Withholding Certificate for IRA Payments Payable Upon Demand and Annual Reminder Notice
	CWF 59A (3/06) - Withholding Certificate for IRA Payments Upon Demand
	CWF 59B (3/06) - Reminder Notice - Withholding Election for Automatic IRA Distributions
	CWF 59C (3/06) - Reminder Notice - Withholding Election for Periodic IRA Distributions
	CWF 59D (3/06) - Withholding Certification for IRA Payments Payable Upon Demand and Annual Reminder Notice
	CWF 59F (3/06) - Withholding Certification for IRA Payments Payable Upon Demand and Annual Reminder Notice
	CWF 61 (9/07) - IRA Beneficiary Designation
	CWF 61A (6/02) - IRA Beneficiary Designation
	CWF 61B (6/98) - IRA Beneficiary Designation

	CWF 61D (5/05) - IRA Beneficiary Designation and Distribution Instructions
	CWF 61I (8/07) - IRA Beneficiary Designation by an Inheriting Beneficiary
	CWF 62 (9/07) - Version 1 - Required Distribution Notice for 2008
	CWF 62 (9/07) - Version 2 - Required Distribution Notice for 2008
	CWF 62 (9/07) - Version 3 - Required Distribution Notice for 2008
	CWF 62 (9/07) - Version 4 - Required Distribution Notice for 2008/
	CWF 62 (9/07) - Version 5 - Required Distribution Notice for 2008
	CWF 62 (9/07) - Version 6 - Required Distribution Notice for 2008
	CWF 62 (9/07) - Version 7 - Required Distribution Notice for 2008 for an IRA Beneficiary
	CWF 62 (9/07) - Version 8 - Required Distribution Notice for 2008 for an IRA Beneficiary
	CWF 63 (3/05) - Periodic Payment Instruction for Distributions (Distributions for Accountholders age 59 1/2 and older, but less than age 70 1/2)
	CWF 64 (1/07) - Periodic Payment Instruction for Accountholders 70 1/2 and Older
	CWF 65 (3/05) - IRA - Certification for Rollovers or Direct Rollovers to an IRA
	CWF 65HK (9/06) - Special Repayment/Rollover Certification Form — for Use by Individuals in the Three Hurricane Disaster Zones
	CWF 65W (3/06) - Conduit IRA - Waiver Form
	CWF 65WR (8/07) - Determination of Eligibility to Use the Automatic Waiver of the 60-Day Rollover Rule
	CWF 66 (10/06) - Direct Rollover Request
	CWF 66HSA (8/07) - Certification for One Lifetime Transfer of IRA Funds to an HSA
	CWF 66I (5/07) - Direct Rollover Request - By Inheriting Beneficiary of Qualified Plan Funds
	CWF 67 (8/07) - Special Explanation Regarding the Withdrawal of a 2008 "Current-Year" Contribution
	CWF 67A (1/07) - Special Explanation Regarding the Withdrawal of a 2007 "Current-Year" Contribution
	CWF 67W - Current Year (2/06) - Worksheet to Calculate the Income Related to the Withdrawal of a Current-Year Contribution(s)
	CWF 67W - Recharacterization (8/07) - Worksheet to Calculate the Income Related to a Recharacterized Contribution
	CWF 68 (8/07) - Transfer of IRA Funds - From Deceased Accountholder to Beneficiary
	CWF 69 (5/03) - Special Instruction - Rollover from an IRA to a Qualified Plan, 403(b) Plan or Section 457(b) Plan
	CWF 80 (6/05) -Automatic Rollover Agreement(Formal statement of relationship between an eligible employer plan and an individual retirement plan provider)
	CWF 80A (6/05) - Automatic Rollover Agreement(When a financial institution serves both as the fiduciary of a pension plan, and also as the IRAProvider)
	CWF 81 (3/05) - Savings Account — Variable Interest Rate for Automatic Rollover IRA
	CWF 82 (3/05) - Money Market Deposit Account for an Automatic Rollover IRA
	CWF 204 (2/08) - Beneficiary's Distribution Notice and Certification Form and Payment Instruction
	CWF 205 (1/08) - Inherited IRA Accountholder's Distribution Instruction and Certificatoin to Comply with RMD Rules
	CWF 306 (5/02) - Worksheet to Calculate the Required Minimum Distribution (RMD)
	CWF 307 (10/05) - Customer Notice and Determination of Customer's Identity
	CWF 312 (2/01) - Certification - Election to Use the Alternative Method for Required Minimum IRA Distributions
	CWF CIP (Date N/A) - The Customer Identification Program (With Respect to IRAs and Other Tax Preferred Accounts)

Roth IRA Forms

<input type="checkbox"/>	CWF 36R (9/99) - Change of Name, Address or Beneficiary to a Roth IRA Account
<input type="checkbox"/>	CWF 36RA (5/98) - Change of Name, Address or Beneficiary to Roth IRA Account
<input type="checkbox"/>	CWF 40R (12/07*) - Roth IRA - Custodial Account Application - Form 5305-RA
<input type="checkbox"/>	CWF 40RI (2/08) - Inherited Roth IRA - Custodial Account Application - Form 5305-RA
<input type="checkbox"/>	CWF 41R (12/07*) - Roth IRA - Trust Account Application - Form 5305-R
<input type="checkbox"/>	CWF 41RI (2/08) - Inherited Roth IRA - Trust Account Application - Form 5305-R
<input type="checkbox"/>	CWF 42R (12/07*) - Roth IRA - Custodial Account Application - Form 5305-RA
<input type="checkbox"/>	CWF 42RI (2/08) - Inherited Roth IRA - Custodial Account Application - Form 5305-RA
<input type="checkbox"/>	CWF 54R (1/07) - Roth IRA - Contribution Form
<input type="checkbox"/>	CWF 54RB (7/07) - Roth IRA - Contribution Form
<input type="checkbox"/>	CWF 54RSD (1/07) - Roth IRA - Trust/Self-Directed Contribution Form
<input type="checkbox"/>	CWF 56R (12/01) - Instruction & Authorization to Transfer Roth IRA Funds
<input type="checkbox"/>	CWF 56RI (1/04) - Instruction & Authorization to Transfer Inherited Roth IRA Funds
<input type="checkbox"/>	CWF 57R (9/07) - Roth IRA Distribution Form
<input type="checkbox"/>	CWF 57RSD (4/07) - Roth IRA Self-Directed or Trust Distribution Form
<input type="checkbox"/>	CWF 61R (9/07) - Roth IRA Beneficiary Designation
<input type="checkbox"/>	CWF 61RA (6/02) - Roth IRA Beneficiary Designation
<input type="checkbox"/>	CWF 61RB (9/07) - Roth IRA Beneficiary Designation
<input type="checkbox"/>	CWF 61RI (9/07) - Roth IRA Designation by an Inheriting Beneficiary
<input type="checkbox"/>	CWF 65R1 (5/06) - IRA - Certification for the Internal Conversion of a Traditional IRA to a Roth IRA
<input type="checkbox"/>	CWF 65R2 (1/08) - IRA - Certification for Rollovers to a Roth IRA
<input type="checkbox"/>	CWF 65R3 (1/08) - Roth IRA - Certification for the Conversion of Funds Within an Employer Retirement Plan to a Roth IRA
<input type="checkbox"/>	CWF 66R (10/06) - Direct Rollover Request Form for a Designated Roth Account
<input type="checkbox"/>	CWF 67R (3/07) - The Withdrawal of a 2007 Excess Contribution from a Roth IRA
<input type="checkbox"/>	CWF 67R (9/07) - The Withdrawal of a 2008 Excess Contribution from a Roth IRA
<input type="checkbox"/>	CWF 68R (4/98) - Transfer of Roth IRA Funds - From Deceased Accountholder to Beneficiary
<input type="checkbox"/>	CWF 204R (11/06) - Roth IRA Beneficiary's Distribution Election and Certification Form and Payment Instruct

Coverdell Education Savings Account (CESA) Forms

<input type="checkbox"/>	CWF 40CE (4/05) - Coverdell Education Savings Account (ESA) - Custodial Account Application
<input type="checkbox"/>	CWF 41CE (4/05) - Coverdell Education Savings Account (ESA) - Trust Account Application
<input type="checkbox"/>	CWF 42CE (4/05) - Coverdell Education Savings Account (ESA) - Custodial Account Application
<input type="checkbox"/>	CWF 54CE (12/03) - Coverdell Education Savings Account (Coverdell ESA) Contribution Form
<input type="checkbox"/>	CWF 54ESD (5/05) - Coverdell Education Savings Account (Coverdell ESA) Trust or Self-Directed Contribution Form
<input type="checkbox"/>	CWF 56CE (8/03) - Instruction & Authorization to Transfer Coverdell ESA Funds
<input type="checkbox"/>	CWF 57CE (5/06) - Coverdell ESA Distribution Form
<input type="checkbox"/>	CWF 57CESD (10/03) - Coverdell ESA Self-Directed or Trust Distribution Form
<input type="checkbox"/>	CWF 57DE (2/02) - Certification of Disability for Coverdell ESAs
<input type="checkbox"/>	CWF 61E (2/02) - Coverdell ESAs - Change in Designated Beneficiary
<input type="checkbox"/>	CWF 62E (5/05) - Coverdell ESA - Naming an Inheriting Designated Beneficiary
<input type="checkbox"/>	CWF 63CE (5/05) - Coverdell ESA - Change in Responsible Individual
<input type="checkbox"/>	CWF 65CE (8/03) - Coverdell ESA - Certification for Rollover to a Coverdell ESA
<input type="checkbox"/>	CWF 67CE (3/07) - The Withdrawal of a 2007 Excess Contribution from a Coverdell Education Savings Account (CESA)
<input type="checkbox"/>	CWF 67CE (6/06) - The Withdrawal of a 2006 Excess Contribution from a Coverdell Education Savings Account (CESA)
<input type="checkbox"/>	CWF 79CE (11/06) - Coverdell Education Savings Account Amendment

SIMPLE-IRA Forms

	CWF 907 (8/06) - SIMPLE - For 2007 Salary Reduction Contribution Instructions, Instruction Regarding Transfers, and Acknowledgment of Receipt of Notice of Withdrawal and Rollover Rights (5305-SIMPLE)
	CWF 907A (8/06) - SIMPLE - For 2007 Salary Reduction Contribution Instructions, Instruction Regarding Transfers, and Acknowledgment of Receipt of Notice of Withdrawal and Rollover Rights (5304-SIMPLE)
	CWF 908 (12/06) - SIMPLE - Summary Description for the 2007 Calendar Year (If Employer has Adopted IRS Model Form 5305-SIMPLE)
	CWF 908A (12/06) - SIMPLE - Summary Description for the 2007 Calendar Year (If the Employer has Adopted IRS Model Form 5304-SIMPLE)
	CWF 908B (08/06) - SIMPLE - Summary Description for the 2007 Calendar Year (Alternative Method)
	CWF 917 (9/05) - Savings Incentive Match Plan for Employees of Small Employers (SIMPLE) - For use With a Designated Financial Institution - Form 5305-SIMPLE
	CWF 917A (9/05) - Savings Incentive Match Plan for Employees of Small Employers (SIMPLE) - For use With a Designated Financial Institution - Form 5304-SIMPLE
	CWF 918 (8/07) - SIMPLE - Summary Description for the 2008 Calendar Year (If Employer has Adopted IRS Model Form 5305-SIMPLE)
	CWF 918A (8/07) - SIMPLE - Summary Description for the 2008 Calendar Year (If the Employer has Adopted IRS Model Form 5304-SIMPLE)
	CWF 918B (8/07) - SIMPLE - Summary Description for the 2008 Calendar Year (Alternative Method)
	CWF 919 (11/02) - A Service Agreement - Formal Statement of Relationship Between a Financial Institution and a Business Customer with a SIMPLE-IRA Plan (5305-SIMPLE)
	CWF 919A (09/02) - A Service Agreement - Formal Statement of Relationship Between a Financial Institution and a Business Customer with a SIMPLE-IRA Plan (5304-SIMPLE)
	CWF 920 (04/97) - SIMPLE - Employee Eligibility SIMPLE-IRA Worksheet
	CWF 921 (04/97) - SIMPLE - Payroll/Contribution Report
	CWF 940 (12/07) - SIMPLE-IRA - Custodial Account Application - Form 5305-SA
	CWF 941 (12/07) - SIMPLE-IRA - Trust Account Application - Form 5305-S
	CWF 942 (12/07) - SIMPLE-IRA - Custodial Account Application - Form 5305-SA
	CWF 956 (02/04) - Instruction & Authorization to Transfer SIMPLE-IRA Funds to Another SIMPLE-IRA or Traditional IRA
	CWF 965 (03/03) - SIMPLE-IRA - Certification for a Rollover to a SIMPLE-IRA from Another SIMPLE-IRA
	CWF 970 (8/07) - SIMPLE - For 2008 Salary Reduction Contribution Instructions, Instruction Regarding Transfers, and Acknowledgment of Receipt of Notice of Withdrawal and Rollover Rights (5305-SIMPLE)
	CWF 970A (8/07) - SIMPLE - For 2008 Salary Reduction Contribution Instructions, Instruction Regarding Transfers, and Acknowledgment of Receipt of Notice of Withdrawal and Rollover Rights (5304-SIMPLE)
	SIMPLE Kit for 5304-SIMPLE (9/06) - SIMPLE Starter Kit: Contents & Instructions
	SIMPLE Kit for 5305-SIMPLE (9/06) - SIMPLE Starter Kit: Contents & Instructions

SEP-IRA Forms

CWF 700 (2/05) - Simplified Employee Pension - Individual Retirement Accounts Contribution Agreement

CWF 701 (4/02) - Salary Reduction Simplified Employee Pension - Individual Retirement Accounts Contribution Agreement

CWF 702 (2/02) - A Service Agreement

Medical Savings Account (MSA) Forms

- MSA 240 (1/03) - Archer MSA - Custodial Account Application
- MSA 241 (1/03) - MSA - Trust Account Application
- MSA 242 (1/03) - MSA - Custodial Account Application
- MSA 254 (1/03) - MSA - Contribution Form
- MSA 256 (2/97) - MSA - Instruction & Authorization to Transfer Funds
- MSA 257 (1/97) - MSA - Distribution Form
- MSA 261 (2/97) - MSA Beneficiary Designation
- MSA 265 (7/99) - MSA - Certification for Rollovers to an MSA
- MSA 267 (2/97) - MSA - Special Explanation Regarding the Withdrawal of an Excess MSA Contribution

Health Savings Account (HSA) Forms

<input type="checkbox"/>	HSA36 (7/06) - Change of Name, Address or Beneficiary to HSA account
<input type="checkbox"/>	HSA 40 (12/07) - HSA - Custodial Account Application
<input type="checkbox"/>	HSA 40A (5/07) - HSA Beneficiary Designation - Attach to Plan Application
<input type="checkbox"/>	HSA 41 (12/07) - HSA - Trust Account Application
<input type="checkbox"/>	HSA 42 (12/07) - HSA - Custodial Account Application
<input type="checkbox"/>	HSA 43 (10/06) - Power of Attorney for HSA Transactions
<input type="checkbox"/>	HSA 54 (1/07) - HSA - Contribution
<input type="checkbox"/>	HSA 54A (9/05) - HSA Contribution Form
<input type="checkbox"/>	HSA 54SD (7/07) - HSA - Self-Directed or Trust Contribution Form
<input type="checkbox"/>	HSA 54SD1 (3/07) - Trust or Self-Directed HSA Change of Investment & Direction Form
<input type="checkbox"/>	HSA 56 (1/05) - HSA - Instruction & Authorization to Transfer Funds
<input type="checkbox"/>	HSA 57 (5/07) - HSA - Distribution Form
<input type="checkbox"/>	HSA 57D (9/05) - Certification of Disability for HSAs
<input type="checkbox"/>	HSA 61 (1/05) - HSA Inheriting Beneficiary Designation
<input type="checkbox"/>	HSA 64 (6/05) - HSA - Certification of Mistaken HSA Distribution
<input type="checkbox"/>	HSA 65 (5/05) - HSA - Certification for Rollovers to an HSA
<input type="checkbox"/>	HSA 66 (8/07) - Certification for One Lifetime Transfer of IRA Funds to an HSA
<input type="checkbox"/>	HSA 66A (2/07) - Certification for One Lifetime Transfer of FSA Funds to an HSA
<input type="checkbox"/>	HSA 66B (2/07) - Certification for One Lifetime Transfer of Terminated HRA Funds to an HSA
<input type="checkbox"/>	HSA 67 (3/07) - HSA - Special Explanation Regarding the Withdrawal of an Excess HSA Contribution
<input type="checkbox"/>	HSA 67W (4/07) - Worksheet to Calculate the Income Related to the Withdrawal of an Excess HSA Contribution
<input type="checkbox"/>	HSA 204 (4/07) - Special Explanation and Certification for a Health Savings Account (HSA) Beneficiary

Qualified Plan (QP) Forms

- QP 854 (10/02) - Qualified Plan Contribution Form
- QP 857 (10/07) - QP Distribution Notice/Election Form

Truth-in-Savings (TIS) Forms

<input type="checkbox"/>	TIS 330 (5/00) - Standard Checking Account
<input type="checkbox"/>	TIS 340 (2/04) - Savings Account - Fixed Interest Rate
<input type="checkbox"/>	TIS 341 (2/04) - Savings Account - Variable Interest Rate
<input type="checkbox"/>	TIS 342 (2/04) - Money Market Deposit Account
<input type="checkbox"/>	TIS 343 (2/04) - Time Deposit - Fixed Interest Rate
<input type="checkbox"/>	TIS 344 (2/04) - Time Deposit - Variable Interest Rate
<input type="checkbox"/>	TIS 345 (2/04) - Time Deposit - Stepped Fixed Interest Rate
<input type="checkbox"/>	TIS 346 (2/04) - Time Deposit - Tiered Fixed Interest Rate
<input type="checkbox"/>	TIS 347 (2/04) - Money Market Deposit - Tiered Account
<input type="checkbox"/>	TIS 348 (2/04) - Money Market Deposit - Tiered Account II
<input type="checkbox"/>	TIS 348A (9/05) - Money Market Deposit - Tiered Account II
<input type="checkbox"/>	TIS 350 (2/04) - Standard Checking Account
<input type="checkbox"/>	TIS 350B (7/07) - Checking Account - Tiered Interest
<input type="checkbox"/>	TIS 350C (7/07) - Checking Account - Tiered Interest
<input type="checkbox"/>	TIS 351 (2/04) - NOW Account
<input type="checkbox"/>	TIS 360 (5/00) - Notice of Change in Terms - Savings Account - Fixed Interest Rate
<input type="checkbox"/>	TIS 361 (5/00) - Notice of Change in Terms - Savings Account - Variable Interest Rate
<input type="checkbox"/>	TIS 362 (5/00) - Notice of Change in Terms - Money Market Deposit Account
<input type="checkbox"/>	TIS 363 (5/00) - Notice of Change in Terms - Time Deposit - Fixed Interest Rate
<input type="checkbox"/>	TIS 364 (5/00) - Notice of Change in Terms - Time Deposit - Variable Interest Rate
<input type="checkbox"/>	TIS 365 (5/00) - Notice of Change in Terms - Time Deposit - Stepped Fixed Interest Rate
<input type="checkbox"/>	TIS 366 (5/00) - Notice of Change in Terms - Time Deposit - Tiered Fixed Interest Rate
<input type="checkbox"/>	TIS 367 (5/00) - Notice of Change in Terms - Money Market Deposit - Tiered Account
<input type="checkbox"/>	TIS 368 (5/00) - Notice of Change in Terms - Money Market Deposit - Tiered Account II
<input type="checkbox"/>	TIS 370 (5/00) - Standard Checking Account
<input type="checkbox"/>	TIS 371 (5/00) - Notice of Change in Terms - NOW Account
<input type="checkbox"/>	TIS 380 (5/00) - Notice of Maturity - Does Not Automatically Renew - Time Deposit - (More Than One Year)
<input type="checkbox"/>	TIS 383 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Fixed Interest Rate (More Than One Year)
<input type="checkbox"/>	TIS 384 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Variable Interest Rate (More Than One Year)
<input type="checkbox"/>	TIS 385 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Stepped Fixed Interest Rate (More Than One Year)
<input type="checkbox"/>	TIS 386 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Tiered Fixed Interest Rate (More Than One Year)
<input type="checkbox"/>	TIS 393 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Fixed Interest Rate (One Year or Less)
<input type="checkbox"/>	TIS 394 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Variable Interest Rate (One Year or Less)
<input type="checkbox"/>	TIS 395 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Stepped Fixed Interest Rate (One Year or Less)
<input type="checkbox"/>	TIS 396 (5/00) - Notice of Maturity - Automatically Renewable - Time Deposit - Tiered Fixed Interest Rate (One Year or Less)

Credit Union (CU) Forms

CU 57D (6/06) - Certification of Disability for Traditional and Roth IRAs