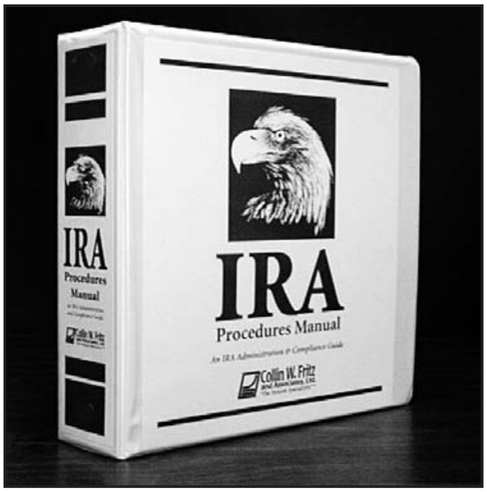
Electronic IRA Procedures Manual

WINDOWS® BASED ELECTRONIC IRA PROCEDURES MANUAL

CWF's IRA Procedures Manual will help you operate in compliance with IRA rules.



All procedures manuals are available on CD.

CWF's IRA Procedures Manual in a PC-format gives you the power to research and answer your clients' questions with the stroke of a key, while your customer is waiting.

For use at a single work station, or on an entire network, this new product provides easy-to-access information, in a Windows® based format, right at your computer.

Updated for EGTRRA to help you operate in compliance with IRA rules – for traditional, Roth, SEP, and SIMPLE IRAs.

A valuable resource to you and your staff:

- Beginning with a definition and explanation of what an IRA is, CWF's IRA Procedures Manual progresses systematically through the many steps in administering an IRA. The manual addresses problem situations and offers solutions.
- This IRA Procedures Manual provides IRA personnel with clear, well-organized information on how to properly document transactions such as opening an account, transferring or rolling over an IRA, making IRA distributions and much more.
- The manual explains when a form must be used, what must be completed, and why it must be completed. Examples of forms are provided, as well as up-to-date information on IRA rules.
- CWF's IRA Procedures Manual is a comprehensive resource you can use to train new personnel and instruct them in many of the basic rules governing IRAs.

Satisfaction Guaranteed!

Manual Chapters (Table of Contents)

Asset Size	Annual Fee
100 million or less	$99
1 billion or less (but greater than 100 million)	$169
Greater than 1 billion	$299

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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***Check the asset size of your institution:** ☐ **100 million or less,** ☐ **1 billion or less (but more than 100 million,** ☐ **greater than 1 billion**

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