

In-House Customized Training

FOR RETIREMENT PLANS

Let CWF show you how you can expand your IRAs, be more informed, be in compliance, and save money!

You Pick the Agenda

- Schedule dates and times at your convenience
- Train your entire staff, not a select few
- Maximize cost by having all of your people attend versus just your IRA representative attending outside seminars
- Compare our cost to our competitors
- Excellent seminar material
- Take a technical topic and make it easier to understand
- Knowledgeable Speakers

Topics

- Traditional IRA
- Roth IRA
- SEP IRA
- SIMPLE-IRA
- Qualified Plans/One-Person 401(k)s
- Coverdell Education Savings Accounts
- Health Savings Accounts

Questions to ask your financial institution: (Let us help you with the answers!)

Is your entire staff aware of all the changes in retirement plans?

Did you know contribution amounts and limits change each year?

Most financial institutions are reporting certain transactions incorrectly, are you?

Do you know why the Roth is such a great retirement plan?

Are your files in compliance?

Would you make it through an IRS audit?

**Please complete the following inquiry,
FAX to (800) 211-0760 or mail to:**

Collin W. Fritz and Associates, Ltd.
P.O. Box 426, Brainerd, MN 56401



Possible Date for Seminar _____

Topics to be Covered _____

Approximate number of attendees _____

Name _____

Title _____

Institution/Organization _____

Address _____

City/State/Zip _____

Phone (____) _____ Fax (____) _____

Visit our web page at www.pension-specialists.com

e-mail us at info@pension-specialists.com