

Brochures

ORDER FORM

Lobby Brochure Order Form

All brochures have been updated to incorporate statutory and regulatory changes.

Name/Description of Brochures

Name		
Institution Name		
Address		
City/State/Zip		
Phone:	Fax:	
e-mail:		
Office Use Only: Acct. No.	Imprint	Date

Name/Description of Brochures	Revised	Brochure Number	Quantity Ordered	Imprint ✓	Var Pack ✓ 10	Price
IRA – Individual Retirement Accounts	10/07	100				
The Roth IRA	10/07	102				
Coverdell Education Savings Accounts	9/06	103				
Why Should I Consider Converting My Traditional IRA into a Roth IRA?	10/07	104				
Calculating Roth IRA Contributions	11/07	105				
The Special 50+ Contribution Rules	11/07	106				
Understanding Required Distributions	10/07	107				
Understanding the IRA Contribution Credit	10/07	108				
IRA-to-IRA Rollovers & Transfers (Including Rules for SIMPLE-IRAs & Roth IRAs)	10/07	109				
IRA Opportunities (Traditional and Roth IRAs)	10/07	111				
2008-2010 Time to Start Making IRA Contributions	12/07	129				
Understanding if You Qualify to Make a Deductible IRA Contribution	11/07	150				
The Spousal IRA and Roth IRA Contribution	11/07	151				
Inherited IRAs	11/07	154				
A Surviving Spouse's Options with Respect to Their Spouse's IRA	1/08	155				
The Inherited Roth IRA – Tax Free Income For Life	1/08	156				
FDIC Insurance – \$250,000 Coverage for IRAs and Other Retirement Accounts	3/06	115				
SIMPLE-IRA – Savings Incentive Match Plans for Employees of Small Employers	10/07	118				
SEP – Simplified Employee Pension Plan	11/07	170				
Qualified Plans – Rollovers and Direct Rollovers	11/07	189				
Nonspouse Beneficiary – Allowed to Directly Roll Over Inherited QP Funds to Inherited IRA	12/07	192				
HSA – Health Savings Accounts	5/08	124				
HSA – Business and Health Savings Accounts	5/08	125				
HSA – Health Savings Accounts and FDIC Insurance	6/06	126				
HSA – Benefit By Moving IRA Funds Tax Free to an HSA	5/08	127				
Variety Pack – Your choice of 10 brochures in a quantity of 10 each, \$35		199				

✓ IMPRINTING INSTRUCTIONS (IMPRINTING INCLUDES ANY FOUR LINES OF TEXT)

LINE 1 _____
 LINE 2 _____
 LINE 3 _____
 LINE 4 _____

Subtotal	_____
Shipping & Handling	_____
Sales Tax (If Applicable)	_____
Total	_____

PRICING FOR BROCHURES

Quantity	50	100	250	500	1,000	1,000+
Nonimprinted	\$28	\$35	\$59	\$97	\$168	Quote
✓ Imprinted	N/A	\$55	\$83	\$125	\$244	Quote
Customized W/Logo	N/A	N/A	\$103	\$159	\$285	Quote

Variety Pack – 10 brochures in a quantity of 10 each \$35.00 Imprinting not available.

