

# IRA Administrative Services

To properly administer IRAs, financial institutions must be equipped to satisfy clients and comply with IRS regulations.

CWF's IRA Department will work with you and your financial institution to eliminate tax-preferred account confusion and time consuming data processing.

## Administration Services

### IRS Required Reports & Notices

- ✓ Form 5498/5498-SA/5498-ESA
- ✓ Form 1099-R/1099-Q/1099-SA
- ✓ RMD Notices
- ✓ Withholding Reminder Notices

### Operations Reports

- ✓ IRA Transaction Register
- ✓ IRA Distribution Report
- ✓ "70½" RMD Report
- ✓ IRA Contribution Report

### Customer Reports

- ✓ IRA Retirement Account Statement.

## Management Reports (if desired)

- ✓ IRA Deposit Analysis Report
- ✓ IRA Distribution Analysis
- ✓ IRA Account Analysis

## Your financial institution provides to CWF:

- New Account Information
- All Contributions (including transfers & rollovers)
- All Distributions
- All Interest Paid
- Any Institution Fees

## Support Services Also Available

- Toll-free IRA Consulting
- Subscription to "The Pension Digest"
- IRA Procedures Manual
- IRA FormSystem™

Please complete the following form for a customized price quotation.

1. I would like CWF to furnish a quotation by:  
 Phone    Mail    e-mail


2. I am interested in administration in regard to (select all that apply):

<input type="checkbox"/> Traditional IRAs	# _____	of accounts
<input type="checkbox"/> Roth IRAs	# _____	of accounts
<input type="checkbox"/> SIMPLE-IRAs	# _____	of accounts
<input type="checkbox"/> Coverdell ESAs	# _____	of accounts
<input type="checkbox"/> HSAs	# _____	of accounts
<input type="checkbox"/> SEP IRAs	# _____	of accounts
<input type="checkbox"/> Other	# _____	of accounts

Describe: \_\_\_\_\_

**Fax form to (800) 211-0760,  
call 1-800-346-3961, or  
email [info@pension-specialists.com](mailto:info@pension-specialists.com)**

**For more information  
visit our web site at:  
[www.pension-specialists.com](http://www.pension-specialists.com)**

 **Collin W. Fritz and Associates, Ltd.**  
PO Box 426 Brainerd, MN 56401

Name \_\_\_\_\_ Title \_\_\_\_\_  
Institution/Organization \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Fax \_\_\_\_\_  
City/State/Zip \_\_\_\_\_ e-mail \_\_\_\_\_  
Institution Asset Size \_\_\_\_\_ Office Use Only: Acct. No. \_\_\_\_\_ Date \_\_\_\_\_