

Lobby Brochure Order Form

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

Name		
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Phone:	Fax:	
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Office Use Only: Acct. No.	Imprint	Date

Name/Description of Brochures

	Revised	Brochure Number	Quantity Ordered	Imprint ✓	Price
IRA – Individual Retirement Accounts	11/18	100			
The Roth IRA	11/18	102			
Coverdell Education Savings Accounts	1/17	103			
Why Should I Consider Converting My Traditional IRA into a Roth IRA?	11/18	104			
Calculating Roth IRA Contributions	11/18	105			
The Special 50+ Contribution Rules	11/18	106			
Understanding Required Distributions	11/18	107			
Qualified Charitable Distributions	11/18	117			
Understanding the IRA Contribution Credit	11/18	108			
IRA-to-IRA Rollovers & Transfers (Including Rules for SIMPLE-IRAs & Roth IRAs)	11/18	109			
IRA Opportunities (Traditional and Roth IRAs)	11/18	111			
You Benefit by Making a Nondeductible IRA Contribution	11/18	129			
Understanding if You Qualify to Make a Deductible IRA Contribution	11/18	150			
The Spousal IRA and Roth IRA Contribution	1/19	151			
Inherited IRAs	1/19	154			
A Surviving Spouse’s Options with Respect to Their Spouse’s IRA	1/17	155			
The Inherited Roth IRA – Tax Free Income For Life	1/17	156			
FDIC Insurance – \$250,000 Coverage for IRAs and Other Retirement Accounts	12/14	115			
SIMPLE-IRA – Savings Incentive Match Plans for Employees of Small Employers	11/18	118			
SEP – Simplified Employee Pension Plan	1/19	170			
One Person 401(k) Plans	12/14	182-A			
Qualified Plans – Rollovers and Direct Rollovers	12/14	189			
Nonspouse Beneficiary – Allowed to Directly Roll Over Inherited QP Funds to Inherited IRA	1/16	192			
HSA – Health Savings Accounts	5/18	124			
HSA – Business and Health Savings Accounts	5/18	125			
HSA – Health Savings Accounts and FDIC Insurance	5/18	126			
HSA – Benefit By Moving IRA Funds Tax Free to an HSA	5/18	127			
HSA – Are You a Beneficiary of an HSA Owner?	1/19	128			

Subtotal	
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✓ **IMPRINTING INSTRUCTIONS (IMPRINTING INCLUDES ANY 4 LINES OF TEXT)**

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

PRICING FOR BROCHURES

Quantity	25	50	100	250	500	1,000	1,000+
Nonimprinted	\$18	\$28	\$35	\$69	\$115	\$209	Quote
✓ Imprinted	N/A	N/A	\$59	\$93	\$136	\$244	Quote
Customized W/Logo	N/A	N/A	N/A	\$113	\$166	\$285	Quote

Brochure titles cannot be combined for quantity pricing.

Note: You may order a quantity of 25 or 50 only if you are ordering a minimum of 4 different brochures.



Electronic IRA Brochures

FOR YOUR WEB SITE

CWF will provide you with the text of these brochures in PDF format so that you can add them to your web site. You will benefit by having a way to explain these law changes to your customers in an easy to understand format. You should not have to worry if your IRA personnel really understand the nuances of IRAs. These brochures cover a topic thoroughly.

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