



BROAD FINANCIAL

## Ultimate IRA<sup>®</sup> Order Form

Name (Title, First, and Last): \_\_\_\_\_

Address: \_\_\_\_\_

City, State & Zip Code: \_\_\_\_\_

County: \_\_\_\_\_

Email address: \_\_\_\_\_

Daytime Telephone Number : \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Referral Source: Chicago Creative Investors Association

Total Cost: \$1,495

Payment:

Credit Card: Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Check: Routing/ ABA #: \_\_\_\_\_ Account #: \_\_\_\_\_

Please provide three choices of names for your Ultimate IRA<sup>®</sup>'s LLC:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Type of funds you will be transferring in (IRA, 401k, SEP IRA, etc.): \_\_\_\_\_

Current Custodian/ Plan Administrator: \_\_\_\_\_

Approximate amount of transfer: \$ \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_





BROAD FINANCIAL

## **Broad Financial Solo 401K<sup>®</sup> Order Form**

Name (Title, First, and Last): \_\_\_\_\_

Address: \_\_\_\_\_

City, State & Zip Code: \_\_\_\_\_

County: \_\_\_\_\_

Email address: \_\_\_\_\_

Daytime Telephone Number : \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Referral Source: **Chicago Creative Investors Association**

Total Cost: \$1,495

Payment:

Credit Card: Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Check: Routing/ ABA #: \_\_\_\_\_ Account #: \_\_\_\_\_

Type of entity that will be adopting the Broad Financial Solo 401K<sup>®</sup> (Sole Proprietorship, LLC, Partnership, S-Corp, C-Corp, LLP, or other): \_\_\_\_\_

Name of the entity (if it is a business, enter the business name; if it is a sole proprietorship, enter your name): \_\_\_\_\_

Type of funds you will be transferring in (IRA, 401k, SEP IRA, etc.): \_\_\_\_\_

Current Custodian/ Plan Administrator: \_\_\_\_\_

Approximate amount of transfer: \$ \_\_\_\_\_

Please confirm that you are self-employed without any full-time employees (defined as employees working 1,000 hours or more per year) and that neither you nor your business owns (80% or more of) any other business that has full-time employees.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

