

CESA Procedures Manual

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CWF's Coverdell Education Savings Account (CESA) Procedures Manual will help you operate in compliance with the most current rules.

This manual is a valuable resource to you and your staff.

- Beginning with a definition and explanation of what a CESA is, CWF's CESA Procedures Manual progresses systematically through the many steps in administering a CESA. The manual addresses problem situations and offers solutions.
- This CESA Procedures Manual provides personnel with clear, well-organized information on how to properly document transactions such as opening an account, transferring or rolling over a CESA, making CESA distributions and much more.
- The manual explains when a form must be used, what must be completed, and why it must be completed. Examples of forms are provided, as well as up-to-date information on CESA rules.
- CWF's CESA Procedures Manual is a comprehensive resource you can use to train new personnel and instruct them in many of the basic rules governing CESAs.
- The IRS has issued reporting forms for CESAs—Form 1099-Q and Form 5498-ESA. This manual has copies and instructions for both.
- The CESA Procedures Manual comes in an attractive three-ring vinyl binder. The manual provides resourceful information and guidance.

Order this valuable CESA reference manual today and put it to use. You'll find that it will help you do your job more easily and efficiently.

The cost: Just \$65, plus \$45 annual update fee (optional, but recommended). Special pricing is available when purchasing multiple copies of the manual. Call for a price quote.

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