

IRA FormSystem Software

Windows® Based IRA Forms Completion Software

IRA FormSystem™

CWF's IRA FormSystem™ software contains more than 200 forms for Traditional IRA, Roth, SEP, SIMPLE, CESA, and optionally HSA and MSA Forms. We have the specialty forms needed to service your clients.

Forms are selected from a plan type and form purpose menu. The FormSystem™ menu can be customized by you by selecting or de-selecting any of the available forms to be used in your organization. FormSystem™ history on all forms is maintained, and can be re-printed or viewed at any time. Default values for every field on every forms may be maintained by the user. The FormSystem™ also performs basic compliance checking at entry time to help ensure that forms are completed correct the first time. Optionally the system can export information entered on all Forms in a given period of time to your host system for further processing. Data from your host system can optionally also be downloaded to the FormSystem™ to eliminated the re-entry of information.

The FormSystem™ is supported by all versions of Windows and networking other networking operating systems. The system can be installed on LAN and WAN systems, and even allows for custom installations on WAN systems to maintain operational speed and data integrity.

Interfaces can optionally be accepted from and directed to virtually any host system. All interfaces are customized and will be quoted on an individual basis.

CWF Form #	Description
CWF31	Disclosure Statement - Projection Schedule
CWF31A	Disclosure Statement - Projection Schedule
CWF32	IRA Disclosure Statement - Individualized
CWF36	IRA Change of Name, Address or Beneficiary Form
CWF36R	Change of Name, Address or Beneficiary to Roth IRA Account
CWF36RA	Change of Name, Address or Beneficiary to Roth IRA Account
CWF39	State of Iowa Withholding Notice
CWF40T	Individual Retirement Application - Customized
CWF41T	IRA Trust Account Application
CWF40TI	Inherited IRA - Custodial Account Application
CWF42T	IRA Custodial Account Application

Simple & Easy Pricing Formula

Annual Fee = \$350 + 30¢ per IRA

Example #1	400 IRAs	$\$350 + .30 (400) =$	\$470
Example #2	1,000 IRAs	$\$350 + .30 (1,000) =$	\$650
Example #3	10,000 IRAs	$\$350 + .30 (10,000) =$	\$4,850
Example #4	50,000 IRAs	$\$350 + .30 (50,000) =$	\$15,350

Over 50,000 IRAs – Call for our quote

*CWF requires a contract for CWF services.

Pricing is based on the number of 5498s your institution files with the IRS each year. You are authorized to use this software on an unlimited number of computers.