

# Electronic IRA Procedures Manual

WINDOWS® BASED ELECTRONIC IRA PROCEDURES MANUAL

CWF's IRA Procedures Manual will help you operate in compliance with IRA rules.

## All procedures manuals are available on CD.

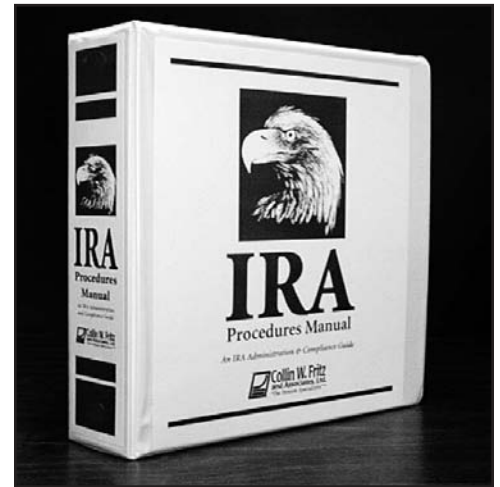
CWF's IRA Procedures Manual in a PC-format gives you the power to research and answer your clients' questions with the stroke of a key, while your customer is waiting.

For use at a single work station, or on an entire network, this new product provides easy-to-access information, in a Windows® based format, right at your computer.

Updated for EGTRRA to help you operate in compliance with IRA rules – for traditional, Roth, SEP, and SIMPLE IRAs.

## A valuable resource to you and your staff:

- Beginning with a definition and explanation of what an IRA is, CWF's IRA Procedures Manual progresses systematically through the many steps in administering an IRA. The manual addresses problem situations and offers solutions.
- This IRA Procedures Manual provides IRA personnel with clear, well-organized information on how to properly document transactions such as opening an account, transferring or rolling over an IRA, making IRA 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 IRA rules.
- CWF's IRA Procedures Manual is a comprehensive resource you can use to train new personnel and instruct them in many of the basic rules governing IRAs.



## Satisfaction Guaranteed!

### Manual Chapters (Table of Contents)

- An Overview
- Steps to Properly Establish the IRA
- Steps to Properly Establish the Inherited IRA
- Investing IRA Contributions & Pitfalls to Avoid
- IRA Amendments
- Administering Contributions & Year-End Reporting
- Methods of Correcting Contributions – Withdrawing or Recharacterizing
- Tax Benefits and Taxation of Distributions
- Additional IRA Taxes
- Direct Transfers, Direct Rollovers, Rollovers and Roth Conversions
- Administering Distributions

- Managing the IRAs of Accountholders Age 70½ and Older
- Administering RMD After the Accountholder Dies
- Substantially Equal Periodic Payments
- Reporting Penalties for the IRA Custodian/Trustee
- Miscellaneous IRA Administrative Topics
- Simplified Employee Pensions (SEPs)
- The SIMPLE Retirement Plan
- Magnetic Media Filing Requirements for IRAs
- IRS Publication 590
- IRS Publication 560

Asset Size	Annual Fee
100 million or less	\$99
1 billion or less (but greater than 100 million)	\$169
Greater than 1 billion	\$299

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\*Check the asset size of your institution:  100 million or less,  1 billion or less (but more than 100 million),  greater than 1 billion



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