



## Ancillary Forms Suite

The Ascensus suite of account maintenance forms is designed to provide the information needed to satisfy various IRS requirements relating to record retention, reporting, notices, and written irrevocable elections for certain transactions.

Forms are available for the following accounts and transactions.

- Traditional IRA
- Roth IRA
- SIMPLE IRA
- Health Savings Account
- Coverdell ESA
- Contributions
- Conversions
- Rollovers
- Transfers
- Distributions
- Designation of Beneficiary

## Ascensus, A Dedicated Partner

The Retirement Products & Solutions (RPS) division of Ascensus (formerly BISYS® Retirement Service) is a respected leader in the retirement plans and savings industry. Since 1975, Ascensus has provided credit unions with premier products, including Traditional and Roth IRA, Coverdell education savings account (ESA), and health savings account (HSA) forms and documents.

Our experienced team of industry professionals continually monitors emerging legislation, government guidance, and industry trends to ensure that the forms you receive from us are the best in the business.

## Forms & Documents

For years we've created the practical forms and documents that you've come to expect. In fact, over four million IRAs have been established on our trademark IRA Simplifier®. And our commitment to providing the most up-to-date, compliant documents is stronger than ever.

Maintaining updated IRA, Coverdell ESA, or HSA forms can be challenging, especially when also trying to keep your staff current with the rules and trends of the industry. Our forms are field-tested and closely monitored by our staff of technical experts, equipping you with a competitive advantage. Implement our IRA, Coverdell ESA, or HSA forms to create organizational efficiencies with cost-effective and consistent documentation that helps ensure IRS-compliant transactions.



## Delivery Options

Each form is available in print or electronic format. Plus, all Ascensus forms and documents can be customized to meet your credit union needs.

**Internet** – Ascensus can provide a complete spectrum of Internet-ready forms that may be integrated into your website or your *IRA Service Center*.

**Custom Print** – Ascensus will customize our forms to present your specific “look” and coordinate them with your other printed materials. Customization may also include content changes.

**Imprinted** – Ascensus’ off-the-shelf forms and documents can be personalized—imprinted with your credit union name, address, phone number, and website.

**Off-the-Shelf** – Ascensus’ off-the-shelf forms and documents may be ordered when you need them and shipped according to your instructions. No minimum order requirements apply.

## Summary

Our dedication to our clients and associates allows us to set the standard in quality, affordability, and effectiveness. We foster a professional environment by emphasizing personal commitment, accuracy, and integrity so we can consistently meet—and exceed—our clients’ and business partners’ expectations. Our commitment to your credit union’s success differentiates us from other retirement service providers in the industry.

## Benefits

- Guaranteed reliance as a custodial/trust agreement
- Compliant, complete documents written in easy-to-understand language
- Turnkey solution for account establishment—all required establishment forms are included in our opening documents

*For more information on these and other Ascensus products and services, please contact an Ascensus Sales Representative at 800-346-3860.*



**Preferred Partner  
Since 1996**

**NAFCU members  
receive a 10%  
discount on all  
Ascensus forms  
solutions.**



People Matter. Quality First. Integrity Always.<sup>SM</sup>

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