

## Electronic Display Document List— IRA

### Organizers

- IRA Organizer—Custodial (IRA-49-BSL)
- IRA Organizer—Credit Union (IRA-49-CU)
- IRA Organizer—Self-Directed (IRA-49-SD)
- IRA Organizer—Trust (IRA-49T-BSL)
- Roth IRA Organizer—Custodial (IRA-CUS-ROTH)
- Roth IRA Organizer—Credit Union (IRA-CU-ROTH)
- Roth IRA Organizer—Self-Directed (IRA-SD-ROTH)
- Roth IRA Organizer—Trust (IRA-T-ROTH)
- Coverdell ESA Organizer—Custodial (IRA-CUS-ED)
- Coverdell ESA Organizer—Credit Union (IRA-CU-ED)
- Coverdell ESA Organizer—Self-Directed (IRA-SD-ED)
- Coverdell ESA Organizer—Trust (IRA-T-ED)
- SIMPLE IRA Organizer—Custodial (IRA-SIMPLE-C)
- SIMPLE IRA Organizer—Trust (IRA-SIMPLE-T)
- Health Savings Account Organizer—Custodial (HSA-CUS-ORG)
- Health Savings Account Organizer—Trust (HSA-T-ORG)

### Miscellaneous Forms

- Request to Transfer Funds (IRA-CMB-TRAN)
- IRA Rollover Review (IRA-CMB-ROLL)
- IRA Excess Contribution Work Sheet (IRA-22)
- IRA Age 70 ½ Calculation Work Sheet (IRA-46)

- Which IRA Is Right for You? (IRA-BRO-COMP)
- IRA Recharacterization Notice (IRA-RCHTROTH)
- Request to Transfer to a Health Savings Account (HSA-REQ-TRAN)
- Health Savings Account Rollover Review (HSA-ROLL-REV)
- Health Savings Account Distribution Form (HSA-DIS)
- Health Savings Account Contribution Instructions (HSA-CONTINST)

#### Educational Brochures

- Straight Answers to Your IRA Questions (IRA-26)
- Calculating Minimum Distributions (IRA-30-BRO)
- Rollovers, Direct Rollovers, and Transfers (IRA-32)
- Discover the Benefits of a Roth IRA (IRA-BRO-ROTH)
- The Simplified Retirement Plan for Your Business (SEP-26)
- Retirement Saving Made SIMPLE for Employees of Small Employers (SIM-BRO)
- Discover the Benefits of a Coverdell Education Savings Account (IRA-BRO-ED)
- IRA Recharacterizations (IRA-RCHT-BRO)
- Traditional IRA Beneficiary Options (IRA-BEN-ROTH)
- Straight Answers to Your HSA Questions (HSA-BRO)

#### About Wolters Kluwer Financial Services

Wolters Kluwer Financial Services is a leading provider of compliance, content, technology, and services for banking, securities, and insurance. To learn more, please visit [www.WoltersKluwerFS.com](http://www.WoltersKluwerFS.com).

