



## Completing the IRA Full Disclosure Statement Amendment Mailing Service Quote Form

### SECURE Act and CARES Act

#### Traditional, Roth, and SIMPLE IRA

For each IRA type to be amended, enter the number of accounts in the **qty.** field. The **Per IRA** field will automatically fill with a dollar amount based on the quantity entered for that IRA type, after which the total estimated mailing cost (not including postage) appears in the **Total** field.

#### Last Steps

1. Complete the **Client Authorization** section with your name and the date where indicated. Your estimated quote total appears in this section. If you are not authorized to make purchases on behalf of your organization, this section must be completed by an authorized individual.
2. Complete the **Organization Contact Information** section with the name, email, and phone number of your organization's mailing project contact. This is the person we will contact for additional information and who will receive our confirmation emails throughout the project.
3. Print the quote, then sign and initial the printed form in the **Client Authorization** section.
4. Scan and email your signed and dated quote to [customersupport@ascensus.com](mailto:customersupport@ascensus.com) or fax your signed quote to **218-825-5010**. Within five business days we will send the mailing project contact a confirmation email that includes information about what to expect next.

**NOTE:** The quote form that follows contains a calculator tool, so it must be completed online by keying information into the **qty.** fields. As you enter information into the applicable **qty.** fields, the calculator will automatically fill the **Per IRA** field in that row with a dollar amount based on the quantity entered.

Please do not print the quote form before keying information into the applicable **qty.** fields. We cannot process quote forms where the quantities have been handwritten because the calculations will be missing.

**Organization Name:**

**Ascensus Organization Number:**

**IRA FULL DISCLOSURE STATEMENT AMENDMENT MAILING SERVICE QUOTE FORM**

**SECURE Act**

**NOTE:** This form contains an automated calculator tool. The applicable **qty.** fields must be completed online so that the **Per IRA** and **Total** fields can calculate and automatically fill.

**✓ Traditional, Roth, and SIMPLE IRA**

Negative Response Amendment Standard Services include the following.

- Full Disclosure Statement IRA Amendment—stock, off-the-shelf
- Print cover letter on white bond, black ink
- Print envelope with client’s name and address (24 lb. white woven)
- Provide mailing service (insert letter and amendment into envelope, meter, and mail)

**IRA AMENDMENT MAILING SERVICE IS BASED ON PER ACCOUNT, PER TYPE**

<b>Traditional IRA</b>	<b>qty.</b>	<b>Per IRA</b>	<b>Total</b>
<b>Inherited Traditional IRA</b>	<b>qty.</b>	<b>Per IRA</b>	<b>Total</b>
<b>Roth IRA</b>	<b>qty.</b>	<b>Per IRA</b>	<b>Total</b>
<b>Inherited Roth IRA</b>	<b>qty.</b>	<b>Per IRA</b>	<b>Total</b>
<b>SIMPLE IRA</b>	<b>qty.</b>	<b>Per IRA</b>	<b>Total</b>

**ADDITIONAL INFORMATION**

- **A \$75.00 minimum mailing charge applies.**
- **Pricing does not include standard first class postage rates.**
- The above pricing includes Ascensus’ standard Full Disclosure Statement Amendments (printed in black ink).
- If the actual number of accounts differs from the quoted quantities, pricing will be adjusted to reflect pricing for the actual quantities mailed.
- For Ascensus *Fully-Administered Program* clients, amendment mailings will be sent using the applicable account owner information in IRAdirect®.
- If customized amendments are required, additional fees will apply, and a separate custom amendment quote will be provided.
- This quote is valid for 30 days.

**CLIENT AUTHORIZATION**

*This section should only be completed by persons authorized to make purchases on behalf of the organization.*

**Estimated Quote Total (does not include postage):**

**Approved By**

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

\_\_\_\_\_  
*(Type Name of Individual Approving Quote)*

**Initial:** \_\_\_\_\_ I have read the above statement, located in **ADDITIONAL INFORMATION**, informing me that this quote does not include postage. Any postage estimates provided are estimates only; the final billing will reflect actual postage amounts.

**ORGANIZATION CONTACT INFORMATION**

**Organization Name:**

**Ascensus Organization Number:**

**Name:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

Please address any questions concerning this quote via email to **customersupport@ascensus.com**. **Signed and dated quotes may be scanned and emailed to customersupport@ascensus.com, or faxed to 218-825-5010.**