

SIMPLE/SEP IRA & QRP* Deposit Form



Return Options:
Electronically via Message Center:
 Log in and go to Client Services > Message Center to attach the file
Regular Mail:
 PO Box 2789, Omaha, NE 68103-2789
Overnight Mail:
 200 South 108th Avenue
 Omaha, NE 68154-2631
 Fax: 866-468-6268

Contribution Remittance for Employers

This remittance form is provided for employers to direct their contributions to the proper accounts in the proportions desired. Please submit this form each time you make a contribution. You may make copies of this form as necessary. Contributions for employer plans are always coded as current year contributions.

Check Number: _____ | Employer Phone Number (in case of questions): _____

Plan Type:
 SEP SIMPLE Individual 401(k) Profit Sharing Money Purchase Pension

Employer Name	Account Number/ Social Security Number	Employer Contribution	Employee Contribution (SIMPLE/401(k) Deferrals Only)	QRP/401(k) Loan Repayments	Total Contribution

Participant Name	Account Number/ Social Security Number	Employer Contribution	Employee Contribution (SIMPLE/401(k) Deferrals Only)	QRP/401(k) Loan Repayments	Total Contribution



