

**IRA ADVANTAGE**

Solo 401k APPLICATION

Please return to: 10300 SW Greenburg Rd., Suite 465
Portland, OR 97223
503.619.0223 Fax: 503.206.7641
admin@iraadvantage.net

Applicant Information:

First Name

MI

Last Name

Phone

Street Address

City, State, Zip Code

County

Email Address

Married?

Y N **Solo 401k Plan Information:**

Plan Name: _____

Company Year End

Plan Address: _____

Effective Date

Trustee(s) Name & Information:

1. Full Name: _____

Address: _____

2. Full Name: _____

Address: _____

Business Purpose of Plan:**How did you hear about us?**

- Real Estate & Real Estate Related Assets
- Lending (startups, existing businesses, etc.)
- Securities, stocks, bonds, mutual funds, etc.
- Precious Metals
- Other: _____

Signature: _____

Date: _____