

INSTRUCTIONS FOR OPENING A Employee Benefit Plan IDA

Complete all REQUIRED and applicable OPTIONAL items. Type or print legibly.

Review eligibility requirements with the Plan, tax advisor or financial representative.
Review the IDA Custody Agreement. Required
Required

Setup Fee \$25.00 & \$150.00 Annual Account Fee - Check payable to Mainstar Trust. Required

Complete and return the Employee Benefit Plan IDA Custody Application/ Simplifier Required

Section 1 Employee Benefit Plan Details

Name of Plan	Required	Plan Trustee	Required
Trustee Contact Name & Address	Required	Trustee Phone Number	Required
Plan Tax ID	Required	Trustee E-Mail address (for electronic statements)	Required

Statement Option Required
Check the frequency of statement that you wish to receive. If no box is checked, the electronic statement option will be used. An email address is **required** for electronic statement delivery. An incorrect or invalid email address will cause an electronic-only statement option to revert to an annual paper statement.

Section 2 IDA Account Holder Information

IDA Account Holder Name & Address	Required	Home Phone Number	Required
E-Mail address (for electronic statements)	Required	Business Phone Number	Optional
Social Security Number	Required	Fax Number	Optional
Date of Birth	Required		

Statement Option Required
Check the frequency of statement that you wish to receive. If no box is checked, the electronic statement option will be used. An email address is **required** for electronic statement delivery. An incorrect or invalid email address will cause an electronic-only statement option to revert to an annual paper statement.

Section 3 Invoice Option

Check the option for which you want to be billed. If no option is marked, your account will be charged. Required

Section 4 Signatures

Both the IDA Account Holder and Plan Trustee must sign in the appropriate fields. Required
Corporate Resolution authorizing Trustee Required

Customer Identification Program

Mainstar Trust has adopted a Customer Identification Program. The identity of all new account owners will be verified. To complete the verification, we may request a copy of a valid driver's license or unexpired government-issued ID card. We may also contact the account owner directly to verify information such as name, address, date of birth, and social security number.

Please return all forms to Mainstar Trust via email (customerservice@mainstartrust.com), fax (913-901-4190), or mail to address on Simplifier.

REQUIRED