



# 401k Account Application

**Mailing Address:**  
137 Broad Street  
Asheville, NC 28801

**Phone:**  
1-866-7500-IRA(472)  
828-257-4949

**Fax :**  
828-257-4948

**Website:**  
[www.americanira.com](http://www.americanira.com)

## ACCOUNT HOLDER INFORMATION (All information in this section is "Required" to open your account)

**Legal Name**

**Physical Address**

**City** **State** **Zip** **Home Phone**

**Email Address** **Social Security No.**

## EMPLOYER INFORMATION

**Name of Company Adopting the Plan**

**Business Type** **Sole Proprietorship** **Partnership** **LLC**  
**C Corporation** **S Corporation** **Other**

**Federal Tax ID** **Fiscal Year End**

**Business Address**

**City** **State** **Zip** **Business Phone**

## THE PLAN TRUSTEE(S)

**Trustee Name**

**Trustee Address**

**City** **State** **Zip**

**Signature of Trustee** **Title**

## PLAN LOANS

**NO.** Your plan is designed to help you save for retirement and does not allow you to take a loan from your account under the plan. If "No" is selected, the remainder of this section will not apply to the Plan.  
**YES.** Although the Plan is designated primarily to help you save for retirement, you may take a loan from the Plan if the loan is used for:

- any purpose to purchase your principal residence to pay for funeral expenses
- to pay for post-secondary tuition for you or your immediate family
- to pay medical expenses for you or your immediate family
- to pay rent or mortgage payments to prevent eviction or foreclosure from your principal residence
- to pay uninsured damage to your principal residence

You will be permitted to have only loan(s) outstanding at a time.

The maximum loan amount available to you will be \$50,000 or 1/2 of the vested balance in the Plan,  
 whichever is less. (maximum allowed) Other

This Plan contains Roth Deferrals, but does not allow you to take loans from Roth Deferrals and earnings.

The interest for your loan will be computed using the prime rate (as specified by the Wall Street Journal)  
Prime rate (as specified by the Wall Street Journal) plus %. Other

When did the Plan become effective? New Plan-the effective date of the Plan is  
Amendment and Restatement of Prior Plan-Original Plan date Amended Plan date

**Accountholder Signature** **Date**

**Plan Number (For Official Use)**