

(Effective March 20, 2018)

MidAtlantic IRA, LLC
118 West Church Street
Frederick, Maryland 21701

240/575.3880 office

301/695.6244 fax

Adopting Employer

Adopting Employer _____

Street Address _____

City _____ State _____ Zip _____

Contact Person _____

Telephone _____

Email _____

Name of Plan

Ind(k) Plan Name _____

TIN# OF PLAN _____ EFFECTIVE DATE OF PLAN ____ / ____ / ____

Trustee of Plan _____

Telephone _____

Email _____

_____ **Ind(k) Plan Sponsor Account #**

_____ FOR OFFICE USE ONLY - Plan Short Name

Plan Sponsor Fees

Ind(k) Annual Plan Fee	\$ 300 /year	5500 Tax Return Filing Fee	(assets valued at \$250k - \$499k)	\$ 275
Obtain TIN/EIN for Ind(k)	\$ 99	5500 Tax Return Filing Fee	(assets valued at \$500k - \$1m)	\$ 500
Consulting Fee with CPA	\$ 300 /hour	5500 Tax Return Filing Fee	(assets valued over \$1m)	\$ 750
Restatement of Ind(k) Documents (approx every 4-5 yrs per IRS)	varies	Notary Fee		\$ 15
Wire transfer - Incoming	FREE	Cashiers or other Official Bank Check		\$ 50
Wire transfer - Outgoing - Domestic	\$ 30	Trust Checks		\$ 10
Special Services - such as research of closed accounts, legal research, expedited investment review or additional processing required for certain complex transactions	\$ 150 /hour	Overnight Mail - Domestic (minimum fee)		\$ 35

Annual record keeping fees are not prorated.

Late Payments: If payment is not received within 30 days from due date reflected on an invoice, a past due notice will be mailed to me & a late fee equal to the lower of (a) 1.5% of the outstanding invoice for every month or partial month that invoice is outstanding or (b) the maximum late penalty permitted under the state law of Maryland, will be assessed to my account. A fee of \$25 will be billed to your account for all declined credit cards. If fees are not paid within thirty (30) days after MidAtlantic IRA, LLC (MIRA) has mailed the past due notice, MIRA will begin the process of closing the account. I agree that accounts with past due fees, unfunded accounts along with accounts with zero value will continue to incur administration fees until such time as I notify MIRA of my intent to close the account or until MIRA resigns as Third Party Administrator. Account may be turned over to a collection agency.

In accordance with your Account Application, this Fee Disclosure is part of your Agreement with the Administrator and must accompany your application

Please print, sign and return this form to: MidAtlantic IRA, LLC | 118 West Church Street | Frederick, Maryland 21701

Trustee Name _____

Signature _____ Date ____ / ____ / ____