YOUR kPlan
A Texas-Sized Small Business Retirement Savings Plan

Internal use only:
ANB Branch:
Bank Officer:

Other:

APPLICATION

Business Name: _____

Address:_____

_____

Contact Person Name: _____ **Title:** _____

Telephone: _____ **Fax:** _____

Email address: _____

Entity: Sole Proprietor ☐ C-Corporation ☐ S-Corporation ☐ LLC ☐ Partnership ☐

Line of Business / Business purposes: _____

Do you own or control other companies or businesses? YES ☐ NO ☐

Number of full time employees including yourself: _____

Other Retirement plans currently in existence:

401(k) ☐ Profit Sharing Plan ☐ Defined Benefit ☐ Simple ☐ SEP/IRA ☐ Traditional IRA ☐

It will take approximately 30 days to process your application. During this time you will be contacted to provide census information which includes; employee name, date of hire, birth date, social security numbers, compensation including bonuses, and hours worked per year (full time / part time / seasonal / leased / contract). We will also discuss options available for you and your company such as appropriate vesting schedules, required contributions, investments, loan options and other provisions. Once your application has been processed we will schedule a time to enroll you and your employees into the plan.

There is a processing fee of *$350.00 and a check for that amount should accompany the application (made payable to American National Bank of Texas). The application can be left at any American National Bank branch or mailed to American National Bank of Texas, Trust Division, 2720 West 7th Street. Suite 202, Fort Worth, TX 76107

If you have any questions please call us at 817.426.8517 or visit our web site at www.anbtx.com/wealth-management/your-kplan. Thank you for your interest in the ANB Small Business Retirement Savings Plan (YOUR kPlan); we look forward to serving you.

_____ _____

Signature *Date*

Investment Products and Services are not FDIC insured, are not guaranteed by The American National Bank of Texas, and may lose value. This is NOT a deposit of American National Bank of Texas and NOT insured by any Federal Government Agency.

*$350 As described represents the out of pocket expense for the joining business; other normal and associated retirement plan expenses will be fully disclosed.