



Internal use only:
 ANB Branch: _____
 Bank Officer: _____
 Other: _____

Application

Business Name: _____

Address: _____

Main contact person name: _____ **Title:** _____

Payroll contact name: _____ **Email address:** _____

Telephone: _____ **Fax:** _____

Email address: _____

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

Line of Business / Business purposes: _____

Tax I.D. Number: _____

Do you own or control other companies or businesses? Yes No

Number of full time employees including yourself: _____

Adviser Name: _____ **Email address:** _____

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 and other provisions. Once your application has been processed a time will be scheduled to enroll you and your employees into the plan.

All startup plans setup with Lincoln Financial require a processing fee of \$350.00*. A check for that amount should accompany the application (made payable to: American National Bank of Texas). **For existing qualified plans setup with BPAS, all plan setup fees will be invoiced to plan sponsor.** The application can be left at any American National Bank of Texas branch or mailed to American National Bank of Texas, Wealth Management Group, 1010 W. Ralph Hall Parkway, Suite 112, Rockwall, Texas 75032

If you have any questions please call us at 800.837.6584 or visit our web site at www.yourkplan.com.
 Thank you for your interest in the **YOUR kPlan sponsored by the American National Bank Of Texas**; we look forward to serving you.

Signature

Date