PACIFIC PREMIER TRUST
A Division of Pacific Premier Bank

Toll Free: 800.962.4238
PacificPremierTrust.com

ESTABLISHMENT DOCUMENTS

Opening a SIMPLE IRA Plan

To open a SIMPLE (Savings Incentive Match Plan for Employees) IRA plan with Pacific Premier Trust, you'll need:

- Account Application
- Affiliated Party Authorization
- Trust Certification Form
- Transfer Initiation Form
- Alternative Asset Transfer / Rollover Addendum
- IRA Custodial Account Agreement
- Custodial Addendum
- IRA Disclosure Statement
- California Consumer Privacy Act (CCPA) Notice
- Privacy Policy
- Fee Schedule

INSTRUCTIONS

Please complete the enclosed Account Application and Transfer/Rollover Request forms, then return them to Pacific Premier Trust. Review the instructions for opening an account and instructions for completing a transfer/rollover request for additional information. Review and retain the Custodial Account Agreement, Disclosure Statement, Custodial Addendum, California Notice at Collection, Privacy Policy and Fee Schedule for your records.

RETURN INSTRUCTIONS

Return the completed forms to Pacific Premier Processing Center by any of the following methods:

Upload forms to:
PacificPremierTrust.com/upload

Fax to: 303.614.7038

Regular Mail:
Pacific Premier Trust
Processing Center
P.O. BOX 981012
Boston, MA 02298

Questions?
Call: 800.962.4238