CompleteIRA Process Overview 401k 2.0
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So how does it all work? What happens; and who is involved? How do I know what is happening, and how do I know if things are moving along properly? What else do I have to do?

…Good questions: Here is an overview of the CompleteIRA 401k process; and its timeframe.

DAY 1-3

a) A completed and signed order form is turned into CompleteIRA's central office.
b) The information is entered into our secure, encrypted, systems.
c) The 401k master plan document is pulled. An adoption agreement is started.
d) If an LLC is used, the application for the state is pulled. Initial documents prepared.
e) Transfer paperwork, if any, is identified.

DAY 3-8

f) The adoption agreement and templates are complete. The 401k plan is formed.
g) The 401k plan's tax identification number is obtained.
h) The client is delivered a package of documents to review and sign.

DAY 5-14

i) Any rollover (if present) is instigated.
j) If used, the LLC now has all formation information needed, and is submitted for filing.
k) The 401k may open a bank account and begin operations with available contributions.

DAY 10-21

l) If used, the LLC is now "of record" with the state.
m) If used, the LLC's EIN number is obtained from the IRS.
n) If used, final, specialized, LLC paperwork is completed.

DAY 10-28

o) Client's rollover funds arrive in the new plan account (by wire or by check).
p) If used, time is scheduled for client to open an LLC checking account (We'll have staff pre-call the bank and verify what should happen to avoid difficulties or delay).
q) If used, the plan releases funds to the LLC in exchange for an authorized interest.
r) Congratulations! You now have complete control of your investing future; as well as enhanced protection of your assets. Our system provides, safety, speed, and control over your assets unmatched by any other retirement account program.

This level of control and freedom is most useful when you can turn to experts for help when you need it. That's why CompleteIRA staff, including our specialized self-directed retirement account legal counsel, are available to help answer questions you may have in the future. In 10 days or 10 years, we are here to help make your journey as safe and as successful as possible.

We are grateful to serve you. Make your future what you want it to be.

Some processes have very technical qualities; the exact methods and phrasing are very important. Each step is reviewed prior to fulfillment. To help make sure your assets can safely be controlled without running into IRS difficulties down the road, please utilize our skill and knowledge by talking to us prior to making new investments.