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- 1. Go to enroll.camaplan.com or use link provided to you
- 2. Click the "open an account" link to register your email

Member Sign-In



Enter in your email adress and select a password

Create Account



- 4. Select the type of IRA you wish to open (Roth, SEP, SIMPLE, Traditional)
 - a. Choose your fee schedule (if investing over \$42,000 it will likely be asset based)
 - b. You have the option to add an interested third party to your account this person may call and speak to us on your account, but cannot make any changes to your account

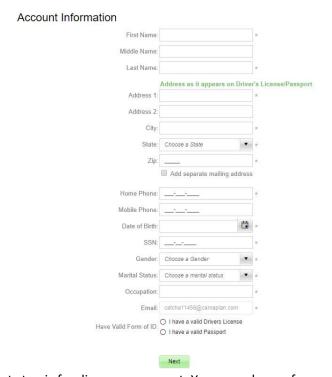






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- 5. Enter in your personal information You will need your drivers license or passport handy
 - a. If you need to stop and save your progress, you must complete the page you are currently working on and click the next button.
 - b. Required fields have a little green asterisk next to them.



6. The next step is funding your account. You may choose from one of the 3 options



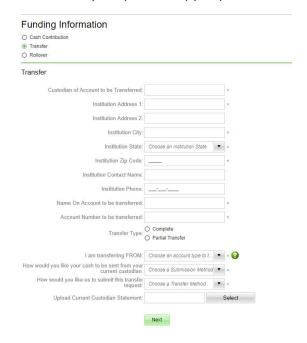
a. Making a current or prior year contribution (sending cash from your personal bank account)



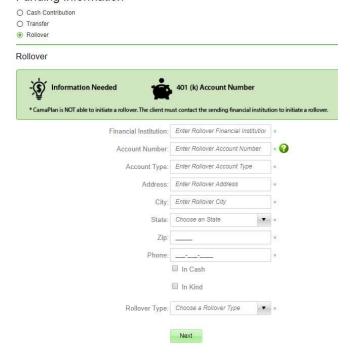


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- b. Transferring funds from an existing IRA, Roth IRA, SEP, or Simple
 - i. You will want to have a copy of your account statement available (name on account and account number is required)
 - ii. It is best if you upload a copy of your statement here as well



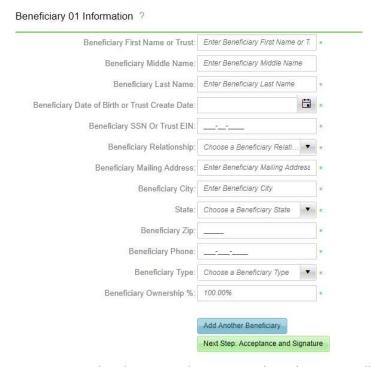
- c. Rolling over from an employer plan like a 401(k), 403(b), annuity or a pension plan
 - i. You will want to have a copy of your account statement available (name on account and account number is required)
 - ii. It is best if you upload a copy of your statement here as well Funding Information





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- 7. The next step is entering in your beneficiaries. Each type of beneficiary must equal 100%
 - You will need each beneficiary's SSN and date of birth Beneficiary Information



8. The last step is to read and approve the terms and conditions. Scroll through the webpage, at the bottom, click "accept terms and conditions" Then the signature box will pop up.



9. Use your mouse to sign in the box. Its best to try to get your signature as close as possible.



- 10. If you need to erase your signature, click the blue arrow to "undo"
- 11. Once your signature is good, click submit
- 12. Your account number will appear at the bottom of the page in red text
- 13. You can download the pdf's that are generated to keep on file. You do not need to send these to CamaPlan.