

# Other Forms/Documents

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A variety of links are provided in the 'Other IRS Forms' box. All forms must be modified and saved to your computer:

- Miscellaneous Plan Forms - includes W-4P Withholding Certificate for Pension or Annuity Payments, 5329 Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts, 8822 Change of Address and 4461-B Mass Submitter
  - SIMPLE Forms - includes: 5304-SIMPLE Savings Incentive Match Plan for Employees of Small Employers (SIMPLE)-w/o Designated Fin. Inst., 5305-SIMPLE Savings Incentive Match Plan for Employees of Small Employers (SIMPLE)- w/ Designated Fin. Inst., and 5305-S SIMPLE Individual Retirement Trust Account, 5305 SA SIMPLE Individual Retirement Custodial Account
  - SEP Forms - includes: 5305-SEP Simplified Employee Pension-Individual Retirement Accounts Contribution Agreement, 5305A-SEP Salary Reduction Simplified Employee Pension-IRAs Contribution Agreement, 5305 Traditional Individual Retirement Trust Account, 5305-A Traditional Individual Retirement Custodial Account, 5306 Application for Approval of Prototype or Employer Sponsored Individual Retirement Arrangement (IRA), and 5306-A Application for Approval of Prototype SEP or SIMPLE IRA Plan
  - Tax Exempt Forms - includes: 1023 Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code, 1024 Application for Recognition of Exemption and 8718 User Fee for Exempt Organization Determination Letter Request
  - Apply for EIN (link to IRS Website)
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