



## Opening Your State Farm Mutual Funds® SEP IRA SEP IRA Employee Instruction Sheet

### Step 1: Information to Obtain from your Employer

- Obtain a copy of the completed plan document, IRS Form 5305-SEP, from your employer

### Step 2: Read the Forms in your Enrollment Kit

- Notice of Privacy Policy
- Custodial Account Agreement/Disclosure Statement
- Mutual Funds Prospectus - the prospectus should be read carefully before making a fund selection.

### Step 3: Complete Forms and Provide to your Employer

- Complete and sign the *Application* for your SEP IRA.
- If you are transferring assets directly from an existing IRA to this SEP IRA, complete the **IRA/TSA Transfer Request form**.
- Please check to be sure that you have properly completed and signed all necessary forms. Your SEP IRA cannot be established without properly completing the necessary forms.
- Please give your completed forms to your employer.

- **Employers Only:**

Send completed forms to:

State Farm Mutual Funds

P.O. Box 219548

Kansas City, MO 64121-9548

**Contact a Retirement Plan Services Representative at 800-447-4930 (option 2) between 8:00 a.m. - 6:00 p.m. CT Monday through Friday for assistance in setting up your SEP IRA plan.**

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