Opening Your State Farm Mutual Funds® SIMPLE IRA

SIMPLE IRA Plan Employee Instruction Sheet

Step 1: Information to Obtain from your Employer

- Obtain a copy of the completed plan document, IRS Form 5304-SIMPLE, from your employer.
- Make sure you received a copy of the Model Notification to Eligible Employees. The *Agreement* can be found on Page 3 of IRS Form 5304-SIMPLE, from your employer. You will need to complete, sign, and return the Salary Reduction Agreement (bottom of page 3) to your employer.

Step 2: Read the Forms in your Enrollment Kit

- Summary Description, IRS Form 5304-SIMPLE
- 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 SIMPLE IRA.
- If you are transferring assets directly from an existing SIMPLE IRA to this SIMPLE IRA, complete the IRA/TSA Transfer Request form.
- Please check to be sure that you have properly completed and signed all necessary forms. Your SIMPLE IRA cannot be established without properly completed documents.
- Please give your completed forms to your employer.
- **Employers Only:**

  Send completed forms to:

  State Farm Mutual Funds
  P.O. Box 219548
  Kansas City, Missouri 64121-9548

Contact a Retirement Plan Services Representative at 1-800-447-4930 (option 2) between 8:00 A.M. - 6:00 P.M. CT Monday through Friday for assistance in setting up your SIMPLE IRA plan.

Securities Issued by State Farm VP Management Corp. One State Farm Plaza, Bloomington, Illinois 61710-0001.
Securities, insurance and annuity products are not FDIC insured, are not bank guaranteed and are subject to investment risk, including possible loss of principal.
Neither State Farm nor its agents provide tax or legal advice.
AP2017/06/0294

This page left intentionally blank.