

Creating your SIMPLE IRA account at Charles Schwab

Click the link:

1. [Open SIMPLE IRA](#)

2. Click the tab “Participants – Enroll in Your Employer Plan”

The screenshot shows the Charles Schwab website's 'SIMPLE IRA' page. The navigation bar at the top includes 'What We Offer', 'What We Charge', 'Why Schwab', and 'Insights'. The main content area is titled 'SIMPLE IRA' and includes a description: 'A Savings Investment Match Plan for Employees (SIMPLE IRA) is an easy and low-cost way to set up a retirement program for self-employed individuals and small businesses with 100 or fewer employees. Eligible employees can fund their own Simple IRA accounts through regular salary deferrals and Employers make additional contributions.' Below the description is a horizontal menu with tabs: 'Overview', 'Account Pricing', 'Related Questions', 'Employers - Establish Your Plan', and 'Participants - Enroll in Your Employer Plan'. The 'Participants - Enroll in Your Employer Plan' tab is highlighted with a yellow circle. Below the tabs, the page asks 'What are the benefits of a SIMPLE IRA?' and lists benefits for employers and participants.

3. Click the orange button lower on the page “OPEN a SIMPLE IRA”

any other provider's Model Plan

The screenshot shows the 'ENROLLMENT DOCUMENTS & ONLINE APPLICATION' section of the Charles Schwab website. It lists three documents with red arrows pointing to them: 'Employee Instructions', 'Schwab IRA Account Application', and 'Elective Deferral Agreement'. Below the list is an orange button labeled 'Open a SIMPLE IRA'.

4. Click the green “No, I’m new to Schwab” (unless you already have a Schwab account)

- 5. Complete the information in the new account screens as prompted.**
- 6. When prompted, the Employer ID is: 4514-6175 and the employer name is The Tam-Pacific Group**
- 7. When complete, write down the 8 digit account number at the top of the screen**
- 8. Click the link "Elective Deferral Agreement"**
- 9. Complete the Elective Deferral Agreement, then print and sign the document**
- 10. Mail the Elective Deferral Agreement to:***

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