



Internal use only:  
 ANB Branch:  
 Bank Officer:  
 Other:

# Application

**Business Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Main contact person name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Payroll contact name:** \_\_\_\_\_ **Email address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Email address:** \_\_\_\_\_

**Entity:** Sole Proprietor  C-Corporation  S-Corporation  LLC  Partnership

**Line of Business / Business purposes:** \_\_\_\_\_

**Tax I.D. Number:** \_\_\_\_\_

**Do you own or control other companies or businesses?** Yes  No

**Number of full time employees including yourself:** \_\_\_\_\_

**Adviser Name:** \_\_\_\_\_ **Email address:** \_\_\_\_\_

**Other Retirement plans currently in existence:**

401(k)  Profit Sharing Plan  Defined Benefit  Simple  SEP/IRA  Traditional IRA

It will take approximately 30 days to process your application. During this time you will be contacted to provide census information which includes; employee name, date of hire, birth date, social security numbers, compensation including bonuses, and hours worked per year (full time / part time / seasonal / leased / contract). We will also discuss options available for you and your company such as appropriate vesting schedules, required contributions, investments and other provisions. Once your application has been processed a time will be scheduled to enroll you and your employees into the plan.

**There is a processing fee of \$350.00\*** and a check for that amount should accompany the application (made payable to: American National Bank of Texas). The application can be left at any American National Bank of Texas branch or mailed to American National Bank of Texas, Wealth Management Group, 1010 W. Ralph Hall Parkway, Suite 112, Rockwall, Texas 75032

If you have any questions please call us at 800.837.6584 or visit our web site at [www.yourkplan.com](http://www.yourkplan.com).  
 Thank you for your interest in the **YOUR kPlan sponsored by the American National Bank Of Texas**; we look forward to serving you.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Investment Products and Services are not FDIC insured, are not guaranteed by The American National Bank of Texas, and may lose value. This is NOT a deposit of American National Bank of Texas and NOT insured by any Federal Government Agency. \*\$350.00 as described represents the out of pocket expense for the joining business; other normal and associated retirement plan expenses will be fully disclosed.