Toll-Free Consulting Service

For Tax-Favored Accounts

Traditional/SEP IRAs · Roth IRAs · SIMPLE IRAs · HSAs · Coverdell ESAs

- Where do you find **reliable, accurate support** for your questions on Tax-Favored Accounts?
- How do you **reduce compliance risks** with your Tax-Favored Account programs?
- Where do you turn for **help with interpretations** of the IRS rules and regulations?

The answer is easy. **CSi's Toll-Free Consulting Service**.

Digging for answers to technical questions on IRAs, HSAs and Coverdell ESAs can be frustrating and is often an inefficient use of time. Because these accounts are very seasonal, having an "answer" source at your fingertips to provide fast, accurate answers to your specific set of circumstances is invaluable.

Get Answers You Need to Simple or Complex Questions

Through CSi's Consulting Service you get help with basic and more complex questions, such as the following.

- What are the rules for making Traditional or Roth IRA contributions?
- How do I determine the net income attributable to an excess contribution?
- How do the HSA and the High Deductible Health Plan work together?
- What are the steps for a recharacterization of a prior conversion?
- What if a customer makes an IRA conversion but later finds out he isn't eligible?

"...extremely pleased with the technical support...consultants are knowledgeable and courteous."

– Bank in Michigan

"...the IRA consulting line is very helpful and knowledgeable."

– Bank in Florida

"...like the use of the IRA consulting and 800 #."

– Bank in California

"...(we) have a lot of different scenarios and the consultants have been very helpful."

– Bank in Michigan

Unlimited Access Gives You The Support You Need

Your annual subscription fee gives you toll-free access and an unlimited number of calls. When you have a question you can't answer, pick up the phone and call professional consultants who are there to help. You'll speak with consultants who deal with these topics every day, all year long and who are leaders in the retirement services industry. Not only do they thoroughly know the rules, but they also continually interact with financial professionals and have acquired a practical understanding of real world issues. They'll help you beyond just reciting rules—**they'll help you apply the rules to your situation.** It's that easy!

Fast, Accurate Responses Mean Better Customer Service

Both you and your customers win when questions can be answered quickly and correctly—the first time.

Subscribe TODAY and improve your support services!
Call CSi's Client Services Department at 800-968-8522, option 1.

CSi: Pioneering New Ideas

Compliance Systems, Inc. (CSi) leads the market with new ideas in how to combine compliance logic and technology to more effectively document transactions in the financial industry. CSi's products leverage a single, data-driven system to dynamically assemble documentation for all key business lines, including deposit, TFA, mortgage, consumer lending, and commercial lending.

Where innovative technology meets compliance

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