

Start here to open your SEP-IRA account at Schwab

Your employer has established a Schwab SEP-IRA retirement savings plan to help you meet your retirement goals. Follow these instructions to open your SEP-IRA account.

Step 1 Review the enclosed Employee Q&A and the SEP-IRA Employee Summary to learn all about the Schwab SEP-IRA.

Step 2 Complete the Schwab IRA Account Application.

Step 3 Return the completed Schwab IRA Account Application to your employer.

For questions or help completing the SEP-IRA forms, see your employer or plan administrator.