



**Order Form**

**Financial Organization Name:** \_\_\_\_\_

**Primary Contact:**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

**Billing Contact (if different from Primary Contact)**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

**Products/Service Selection**

**Option #1: Stand Alone**

IRA Stuff™ - Single Subscription ..... \$395/yr.

HSA Stuff™ - Single Subscription ..... \$395/yr.

IRA/HSA Consulting Hotline ..... \$595/yr.

**Option #2: Stand Alone**

IRA Stuff™ - single subscription with IRA/HSA consulting hotline ..... \$695/yr.

HSA Stuff™ - single subscription with IRA/HSA consulting hotline ..... \$695/yr.

Both IRA and HSA Stuff subscriptions with IRA/HSA consulting hotline ..... \$995/yr.

Are you interested in having firm-wide access to IRA Stuff™ and/or HSA Stuff™ for all associates?  
If so, call us at 218-824-4900 to discuss deep discounts available for firm-wide subscriptions.

**Instructions**

After completing all appropriate fields, please submit the form via one of the following options.

1. FAX completed form to [218-824-4948](tel:218-824-4948)
2. Scan completed form, and e-mail to [stuffstaff@convergentrps.com](mailto:stuffstaff@convergentrps.com) (In the subject line of e-mail, please type "Stuff/Consulting Order")
3. Mail the completed order form to the following address  
 Convergent Retirement Plan Solutions, LLC  
 Attn: Training Fulfillment  
 19533 State Highway 371  
 Brainerd, MN 56401
4. Or, simply phone in your order by calling us at [218-824-4900](tel:218-824-4900)