



## SIMPLE IRA PLAN: PLAN SPONSOR ON-LINE

Effective October 1, 2006, Natixis Funds no longer offers SIMPLE IRAs.

SIMPLE IRA plans established prior to October 1, 2006 may remain active and continue to add new employees.

## PLAN SPONSOR BENEFITS

The Funds offers a convenient, efficient way to manage your SIMPLE IRA Plan: Plan Sponsor On-Line. This Internet site provides plan and participant information and will also allow you to submit SIMPLE IRA payroll information and contributions electronically – via the Internet and Automated Clearing House (ACH).

### Advantages of Plan Sponsor On-Line include:

- Fast and accurate payroll processing without having to retype participant information each pay period
- Contributions credited to participant accounts in a timely manner
- Cost savings since you no longer need to write and mail checks
- An overview of plan data, employee information, and investments
- The ability to download trust reports
- Transaction history and investment allocations by participant

## SIMPLE IRA PARTICIPANT FEES

- No Set Up Fee
- **\$20 Annual fee for Plan Sponsors with Automated Payroll Processing (Plan Sponsor Online and Automated Clearing House)**  
*Debited \$5.00 per quarter*
- **\$35 Annual fee for Plan Sponsors with Manual Payroll Processing (all other methods)**  
*Debited \$8.75 per quarter*

## PLAN SPONSOR ON-LINE: ACH APPLICATION

Use this form to enable you to send electronic payroll contributions from your bank checking account to your SIMPLE IRA participant accounts via the Automated Clearing House (ACH) network.

### PLAN INFORMATION (please print)

Plan Name	Plan ID Number	
Plan Address		
City	State	Zip Code
Contact Name	Telephone Number	
E-mail Address		

### BANK INFORMATION

Replace existing       New request       Add new to existing

Name of Bank			
Address of Bank	City	State	Zip
Bank Account Number			
Bank ABA Number			

Which account is the default?    Account on Record    Account listed above

A copy of a check from the bank account from which the electronic transfer will be made must be attached to this form. By signing below, you are authorizing an electronic debit to be processed from the above noted account in order to fund the plan payrolls. You are further certifying that you are authorized to process this transaction.

Printed Name		
<b>X</b>	Authorized Signer	Date
Signature		

PLEASE TAPE A PRE-PRINTED CHECK MARKED "VOID" FROM YOUR CHECKING ACCOUNT OVER THIS SPACE

(We cannot accept cash management, mutual fund, or brokerage checks)