ICON
ACCOUNT ESTABLISHMENT

Instructions for Solo 401(k) Account

The following forms are included:

- Trust Company Management Agreement
- Solo 401(k) Account Application
- 401(k) Trust Company Adoption Agreement
- Institutional Transfer Form

All forms should be sent directly to ICON Advisers, Inc. at the following address:

ICON Advisers, Inc.
5299 DTC Blvd, 12th Floor
Greenwood Village, CO 80111

FORMS SENT DIRECTLY TO TRUST COMPANY OF AMERICA MAY DELAY THE PROCESS.

All questions should be directed to ICON Advisers, Inc. at 1-800-828-4881.

If you need to provide an ADV to your client, you can download it from our website at www.iconadvisers.com or call **1-800-828-4881**.

The forms included are documents from Trust Company of America. ICON makes no representation as to the accuracy or completeness of the information contained in or requested by these forms.

ICON