STEP 1

If you are planning on rolling over funds or transferring funds from a qualified plan please contact your plan administrator before beginning this process. Contacting the plan administrator first will help you determine if they would like to utilize their forms to process the transaction before you fill out the forms available through COGBF Financial Solutions, Inc. website. Please inquire whether your Plan Administrator accepts digital signatures or physical ones. Contacting your plan administrator can save you time and effort.

STEP 2

To open a new Roth IRA, click here to complete application.

STEP 3

Next click here to complete the Roth IRA Transfer Request form:
Also click HERE for the Rollover Certification Form.

STEP 4

Complete the Investment Authorization and IRA Attestation forms. Email them to fs@cogbf.org OR fax 904-574-9871.

STEP 5

Please send a current plan statement to Goldstar. This is required. Goldstar will handle requesting your funds from your Plan Administrator.

STEP 6

Once you have received your Goldstar account number via mail or email confirmation please contact Goldstar to register your account. Funds will either be mailed or wired.

CHECKLIST See Investment Forms for other documents

*Roth IRA Simplifier

*Roth IRA Transfer Request

*Plan Statement

*IRA Attestation

*IRA Investment Authorization