



Solo 401(k) Checking, Made Simple

www.fortisbankus.com



Our Solo 401(k) Checking Accounts are designed to give business owners direct, convenient access to their self-directed retirement funds to facilitate permissible transactions within a self-directed Solo 401(k) plan.

Products

Designed to facilitate timely execution of permissible retirement investment transactions while maintaining separation of retirement assets.



Solo 401(k) Checking Account

Clear separation between personal and retirement assets.



Digital Banking

Conduct your banking safely anywhere you have connectivity.



Secure Payments

Send and receive electronic payments efficiently and securely.

Process

Setup Your
Self-Directed
401(k) Plan with a
Plan Administrator

Open Your
Solo 401(k)
Checking Account

Initiate a Rollover
Request with your
Current 401(k)
Plan Administrator

Funds Received
in your Solo
401(k) Checking
Account

Execute
Investments
Permitted Under
Your Plan



Contact Our Team Today

© 2026 Fortis Bank. All Rights Reserved. Banking products offered by Fortis Bank, Member FDIC, Equal Housing Lender and wholly owned subsidiary of Fortis Bancorp. Terms and conditions apply. FDIC insurance covers deposits held at Fortis Bank within applicable insurance limits. Non-deposit investments are not FDIC insured, are not guaranteed by the bank, and may lose value. Fortis Bank does not provide tax, legal, or investment advice. Consult your tax or financial advisor regarding self-directed IRA and 401(k) rules and potential prohibited transactions. Self-directed IRA investments remain subject to IRS rules, including prohibited transaction requirements.

