

This form is to be completed and submitted with the INVESTMENT AUTHORIZATION form.

Return by regular or overnight mail: 5024 S. Bur Oak Place, Suite 200, Sioux Falls, SD, 57108
Fax: 605-415-4296 | Email: investment@IRAFinancialTrust.com | For inquiries, call: 800-472-1043 or visit IRAFINANCIALTRUST.COM

A. IRA OWNER IDENTIFICATION

FULL NAME _____ PHONE NO. _____ ACCOUNT NUMBER _____

B. INVESTMENT/DESCRIPTION

Provide name or type of investment in which you wish to invest (real estate, LLC, limited partnership, business entity, etc.)

C. QUESTIONNAIRE

1. Will you be lending funds to a family member, or investing jointly with a family member who will use their personal funds in the investment?

Yes No

If yes: How are you related to the family member? (Write "self" if yourself): _____

If investing jointly, what is the percentage of ownership: _____ %

2. If investing in a company, do you or any family member own any personal units/shares in the company?

Yes No

If yes: How are you related to the family member? (Write "self" if yourself): _____

What is the percentage of ownership? _____ %

3. If investing in a company, are you or any family member employed by the company?

Yes No

If yes: How are you related to the family member? (Write "self" if yourself): _____

What position is held? _____

4. Are you or any family member the main decision-maker or majority owner of the company your self-directed IRA or IRA LLC is investing in?

Yes No

If yes: How are you related to the family member? (Write "self" if yourself): _____

5. Will you or any family member be receiving any personal gain directly or indirectly as a result of your IRA investment in the company?

Yes No

If yes: How are you related to the family member? (Write "self" if yourself): _____

Please explain: _____

6. Additional comments and/or explanations:

D. ACKNOWLEDGMENT & SIGNATURE

Custodial account holder confirms that this purchase does not include any illegal or impermissible investments under South Dakota or Federal law, including, but not limited to, holdings of marijuana or other illegal substances, illegal gambling, or illegal artifacts.

IRA Owner Signature

Date (mm/dd/yy)