

Self Directed IRA Questionnaire

The following information will be used to prepare your account opening documents with the IRA custodian of your choice.

We will help you fill out the IRA custodian applications and UPS the app to you for your signature based on the info below.

Ownership Information

Name of account owner: _____
Name of spouse (*Spousal consent may be required in some states*): _____
Address: _____
Street: _____
Mailing: _____
City & State: _____ State: _____
Zip Code: _____
Email: _____
Phone: _____
Social Security Number: _____
Date of Birth: _____
Driver's license Number and State of Issue: _____
Driver's License Expiration Date : _____

Beneficiary Information:

Primary Beneficiary Name: _____
Relationship: _____
Date of Birth & SSN: _____ SSN: _____

Contingent Beneficiary #1 Name: _____
Relationship: _____ % Share: _____
Date of Birth & SSN: _____ SSN: _____

Contingent Beneficiary #2 Name: _____
Relationship: _____ % Share: _____
Date of Birth & SSN: _____ SSN: _____

Please Enclose A Clear and Legible Scan or Copy of Driver's License

Fee Payment Preferences

Options include check, credit card or debit from account. Please state your choice-

Credit Card (Y/N): _____ Check (Y/N): _____ Debit (Y/N): _____

Credit Card Information, if applicable:

Name on Card: _____

Card Number and Type: _____ Type: _____

Expiration: _____

Security Code: _____

Incoming Transfer Rollover Information:

Company Name of Current Custodian: _____

Phone: _____

Fax: _____

Address: _____

Account Owner Name: _____

Account Number: _____

Account Type: _____

Partial, Or Complete Rollover?: _____

If Partial, Amount?: _____

If you have multiple incoming Qualified plans, fill out for each account.

Company Name of Current Custodian: _____

Phone: _____

Fax: _____

Address: _____

Account Owner Name: _____

Account Number: _____

Account Type: _____

Company Name of Current Custodian: _____

Phone: _____

Fax: _____

Address: _____

Account Owner Name: _____

Account Number: _____

Account Type: _____