



DIRECTION TO INVEST

P.O. Box 3587, Albuquerque, NM 87190 • Toll Free: 1-800-529-3951 • Local: 505-514-0539 • Fax: 505-792-6096 • help@specializediraservices.com

Submit this form along with all supporting documents specific to your investment type. If you need assistance, don't hesitate to give us a call by dialing 1-800-529-3951.

Notes:

- Please complete all fields listed below. Failure to complete all required fields may cause a delay in the processing of your investment.
- Please verify that the issuer or sponsor of your investment has provided Specialized IRA Services with all required materials and forms. All required items will need to be received by SIS before the investment can be processed.

PART 1: ACCOUNT HOLDER INFORMATION

Name: _____ Account #: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Are we authorized to speak with your investment sponsor if corrections or additional items are needed? Yes No

PART 2: INVESTMENT INFORMATION

Investment Sponsor (if applicable): _____

Name of Investment: _____

** this is how your asset will appear in your account. Example: 123 Maplewood Rd*

PART 3: PROCESSING OPTIONS

- Standard Processing Express Investment Processing* Specialized Black

** Please note that all required items must be received by SIS no later than 11:30 AM Mountain Time to be eligible for same day processing. Any requests received after the cutoff time will be processed the next business day.*

PART 4: INVESTMENT TYPE All documents must be titled to Specialized IRA Services for the benefit of your account. Example: Specialized IRA Services FBO [your name], [Account Type]

Investment Type

Supporting Documents Required

- Real Estate _____ All documents associated with the purchase of real estate (Purchase Agreement, Appraisal or Broker Opinion Letter, Etc.)
- Promissory Note or Mortgage _____ Copy of Promissory Note or Mortgage and Security Interest (Deed of Trust, Deed of Mortgage and Security Agreement).
- Limited Liability Company _____ Copy of Tax ID, Articles of Organization and Operating Agreement signed by Members
- Limited Partnerships _____ Copy of Tax ID, Certificate of Limited Partnership and Limited Partnership Agreement signed by all Partners.
- Private Stock/C-Corporation _____ Copy of Tax ID, Articles of Incorporation and By-Laws. All Original Stock Certificates Must be Held by Specialized IRA Services
- Private Placement Memoranda ("PPM") _____ Copy of Private Placement Memoranda, Operating Agreement and Subscription Agreement.

Other : _____
(please call to verify that your investment can be held in an IRA and what supporting documents are required prior to submitting any "other" investment type)

PART 5: ACCOUNT HOLDER INFORMATION

PLEASE VERIFY THAT YOU HAVE SUFFICIENT SETTLED FUNDS IN YOUR ACCOUNT TO MAKE THIS INVESTMENT. INSUFFICIENT FUNDS WILL DELAY YOUR INVESTMENT.

Amount of Funding Requested : \$ _____

Send these funds by check *(Please Select a Check Type and Mailing Method Below)*

Make Check Payable To : _____

Mailing Address : _____ City : _____ State : _____ Zip : _____

Send this check by:

Regular Mail

Overnight Mail

Cashiers Check

Send these funds by Wire *(DOMESTIC ONLY - Please Attach a Wire Instruction Sheet if Available)*

Wire Instructions

Bank Name: _____ Name on Account: _____

Account Number: _____ ABA # *(bank routing number)*: _____

Address: _____

City: _____ State: _____ Zip: _____

Contact Phone #: _____

PART 6: HOW WOULD YOU LIKE TO PAY YOUR FEES?

Please choose a method to pay for any service-related fees associated with this transaction:

Deduct Fees from my Account

Charge the Credit Card on File * by electing this option, you authorize Specialized IRA Services to charge your credit card for all fees associated with this transaction.

PART 7: SIGNATURE AUTHORIZATION

My IRA account is self-directed and I alone am responsible for the selection, due diligence, management, review and retention of all investments in my account. I agree that Specialized IRA Services is not a "fiduciary" for my account, as the term is defined by in the Internal Revenue Code, ERISA or any other applicable federal, state or local laws. I hereby direct SIS, in a passive capacity, to enact this transaction for my account, in accordance with my agreement. I have read and received all pertinent information relating to the investment named herein.

Account Holder Signature: _____
(Please Print and Sign Here)

Date: ____ / ____ / ____

Internal Use