



PO Box A3535  
Chicago, IL 60690  
Phone: 888-795-7950

# Investment Directions

**Account Owner Information**

IRA Account Number: \_\_\_\_\_

First and Last Name: \_\_\_\_\_

Last 4 of SSN: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

**Investment Information**

Select an Asset Type:

Private Placement

Loan

Other

Type/Name of Investment: (ex: Loan to January Jones, Purchase ABC Company Private Stock)

Investment Contact Name and Phone: \_\_\_\_\_

Amount to Invest: \$ \_\_\_\_\_ -or-  Invest All Available Cash

\*Please note: IRA Club will maintain a minimum cash balance of \$500 in the account plus any additional fees to process this investment.

**Funds Delivery Instructions**

**Mail a Check** (\$125 + \$50 + \$15) Address: \_\_\_\_\_

**Send a Wire Transfer** (\$125 + \$50 + \$35)

Bank Name: \_\_\_\_\_ Bank Phone #: \_\_\_\_\_

Bank Address: \_\_\_\_\_

Account #: \_\_\_\_\_ ABA Routing #: \_\_\_\_\_

Name on Account: \_\_\_\_\_

Account Holder Address: \_\_\_\_\_

Reference/Memo: \_\_\_\_\_

By signing below, I instruct, order and direct the IRA Club to make the investment identified in the form. I acknowledge that I am solely responsible for this Investment Direction and the IRA Club has not and will not perform due diligence on this investment.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_