



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

# Expense Payment Request for Real Estate

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## Account Owner Information

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

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

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

## Payment Information

**\*Please include a scanned copy bill / invoice when submitting this form.**

Asset Reference: \_\_\_\_\_

(ex: property address)

Amount: \$ \_\_\_\_\_ Payment Due Date: \_\_\_\_\_

Purpose of Payment: \_\_\_\_\_

(ex: "property taxes, insurance, HOA fees, rehab" etc.)

\*Please note: IRA Club will maintain a minimum cash balance of \$500 in the account plus any additional fees to process this investment. The payee information and the dollar amount to be paid based on your percentage of ownership. (For example: If your account owns 50% of the property and the bill is for \$1,000.00, you would enter \$500.00)

## Funds Delivery Instructions

Mail a Check (\$15) via  Regular Mail  Overnight (+\$35)

Payee Name: \_\_\_\_\_

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

Street

City/State

Zip

Send a Wire Transfer (\$35)

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

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

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

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

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

Email to: [Investments@iraclub.org](mailto:Investments@iraclub.org)

Fax to: 888-600-6997



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## Payment Authorization

I agree to release, indemnify, defend, and hold IRA Club and its related employees harmless for any claims arising out of this payment. This includes, but is not limited to, claims that this payment is not prudent, proper, legal, or diversified. I also understand and agree IRA Club will not be required to take any action should the investment noted herein becomes subject to default, or loss due to fraud, insolvency, bankruptcy, or other court order or legal process. This payment is further subject to all terms and conditions of the account-holder's Custodial Agreement within IRA Club and all applicable State and Federal laws. I understand the prohibited transaction rules and I attest that this request does not cause a prohibited transaction.

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