

# Fee Schedule Self Directed Custodial IRA

For Traditional, Roth, SEP & Simple IRA  
Effective January 1, 2019



888-795-7950  
Fax: 888-600-6997  
www.iraclub.org

The IRA Club **does not** charge a fee based on the account value

|                                    |              |
|------------------------------------|--------------|
| <b>One Time Account Set Up</b>     | <b>\$40</b>  |
| <b>Annual Membership (Per IRA)</b> | <b>\$135</b> |
| <b>Annual Fee (Per Asset)</b>      |              |
| • Domestic Real Estate             | <b>\$165</b> |
| • All Other Assets                 | <b>\$125</b> |

## Activity Fees

|   |             |
|---|-------------|
| Buy or Sell Domestic Real Estate  | <b>\$75</b> |
| Buy or Sell All Other Assets  | <b>\$50</b> |
| Checks Deposited to the IRA   | <b>\$0</b>  |
| Checks out of the IRA   | <b>\$15</b> |
| Processing Invoices or Bills Sent Directly to IRA Club<br>(property tax, insurance, water, contractor bill) | <b>\$15</b> |
| ACH Payments out of IRA (recurring distributions)   | <b>\$5</b>  |
| Leveraged Real Estate (billed annually)   | <b>\$50</b> |
| Bank Wire In (domestic)   | <b>\$25</b> |
| Bank Wire Out (domestic)  | <b>\$35</b> |
| Contributions Made to an IRA by Credit Card   | <b>3%</b>   |
| Incoming Funds by ACH<br>(for accounts opened after 1/1/14)   | <b>\$0</b>  |
| Flipper Special (20 checks in a 6 month period)   | <b>\$99</b> |
| Account Statement (requested paper or fax)  | <b>\$5</b>  |

|  |                   |
|--|-------------------|
| In Kind Asset Transfer from a Former Custodian<br>(other than Real Estate) | <b>\$40 each</b>  |
| In Kind Asset Transfer from a Former Custodian<br>(Real Estate)            | <b>\$125 each</b> |
| Incomplete or Late Asset Valuation Form                                    | <b>\$90</b>       |
| Roth Conversion  |                   |
| • Cash   | <b>\$15</b>       |
| • Asset (other than Real Estate)   | <b>\$20</b>       |
| • Asset (Real Estate)  | <b>\$40</b>       |
| Overnight Mail   | <b>\$35</b>       |
| Extra or Nontraditional Administrative Services                            | <b>\$100/hr</b>   |
| Buy or Sell Offshore Real Estate   | <b>\$295</b>      |
| Annual Fee Offshore Real Estate  | <b>\$195</b>      |
| Account Termination  | <b>\$150</b>      |

### Please Note:

- Fees are deducted from the IRA account.
- Fees may be subject to change. Visit [www.iraclub.org](http://www.iraclub.org) for the current fee schedule.
- Asset fees are charged at the time the asset is purchased and annually on the anniversary.

### Minimum Account Balance:

Minimum Cash Balance in the IRA Account \$500