

# Fee Schedule Self Directed Custodial IRA



**Traditional, Roth, SEP & Simple IRA**  
Effective January 1, 2021

<b>One Time Account Set Up</b>	<b>\$20</b>
<b>Annual Membership (Per IRA)</b>	<b>\$175</b>
<b>Annual Fee (Per Asset)</b>	
● Domestic Real Estate	<b>\$165</b>
● All Other Assets	<b>\$125</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**

- Below minimum cash balance \$50/qtr

## Miscellaneous

Buy or sell domestic real estate	75
Buy or sell all other assets	50
Checks deposited to the IRA	0
Checks out of the IRA	15
ACH payments out of IRA (recurring distributions)	5
Leveraged real estate (billed annually)	200
Bank wire in (domestic)	25
Bank wire out (domestic)	35
Contributions made to an IRA by credit card	3.5%
Incoming funds by ACH (for accounts opened after 1/1/14)	0
Flipper special (20 checks in a 6 month period)	99
Account statement (requested paper or fax)	5
Extra or nontraditional administrative services	100/hr

In kind asset transfer from a former custodian (other than real estate)	40 each
In kind asset transfer from a former custodian (real estate)	125 each
Incomplete or late asset valuation form	150
Roth conversion	
● Cash	15
● Asset (other than real estate)	50
● Asset (real estate)	75
Overnight mail	35
Buy or sell offshore real estate	295
Annual fee offshore real estate	195
Account termination	200