

ESTABLISHING AN INHERITED SELF DIRECTED IRA NEW ACCOUNT INSTRUCTIONS

SUBMIT TO

EMAIL

newaccounts@iraclub.org

MAIL

67 E. Madison St.
Suite 1510
Chicago, IL 60603

FAX

312-283-2615

TYPICAL TRANSFER SPEED

FIDELITY	●●●●●
CHARLES SCHWAB	●●●●●
MORGAN STANLEY	●●●●●
AMERIPRISE	●●●●●
TD AMERITRADE	●●●●●

QUESTIONS?

Monday - Friday
9:00AM - 5:00PM CST

T 312-795-0988
E newaccounts@iraclub.org

www.iraclub.org

PLEASE NOTE: Federal law requires financial institutions to obtain, verify, and record information that identifies each client who opens an account to help the government fight the funding of terrorism and money laundering activities.

SEND

- Completed Application
- Copy of Driver's License, ID, or Passport
- Copy of Death Certificate
- IRA Transfer Request Form (if applicable)
- Copy of IRA/401(k) Account Statement

REQUIRED INFORMATION

- Full Name
- Social Security Number
- Date of Birth
- Address
- Email Address
- Credit Card Information
- Beneficiary Designations
- Decedent Information (Name, SSN, DOB, DOD, etc.)

HOW TO FUND THE IRA

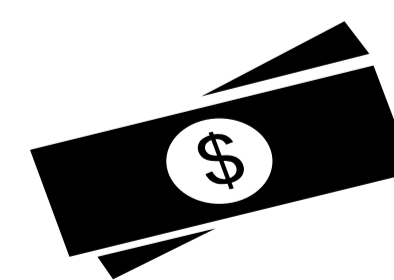
- IRA to IRA Transfer
- Rollover from a 401(k), 403b, 457a, TSP, or Pension
- Annual Contribution

RESOURCES

- Resource Center on our website
- Video Library
- Guides
- Free Prohibited Transaction Analysis
- Automatic Contribution Setup



OPEN



FUND



INVEST