



PO Box A3535
 Chicago, IL 60690
www.iraclub.org
 312-795-0988

PRIVATE ENTITY INVESTMENT DIRECTIONS

Use this form to provide IRA Club with instructions to make an investment from your IRA account. Please submit the supporting documents with this request so IRA Club may complete the mandatory administrative review.

General Requirements

Your IRA is the investor in this transaction. All documents should list the investor as "IRA Club FBO (Your Name) IRA (Account #)" The required supporting documentation is listed below. Documents that IRA Club is required to countersign on behalf of the IRA account must be signed "read and approved" by the account owner.

Private LLCs: (1) LLC Certificate of Good Standing (2) EIN (3) Operating Agreement (4) Subscription Agreement if applicable (5) Offering Memorandum

Limited Partnership: (1) Certificate of Good Standing (2) Limited Partnership Agreement (3) Subscription Agreement if applicable (4) Offering Memorandum

Corporate Stock: (1) Certificate of Incorporation (2) Articles of Incorporation (3) Offering Memorandum (4) Subscription Agreement -or- Stock Purchase Agreement (5) Copy of Bylaws

1. Account Owner Information

First and Last Name: _____ IRA Club Account Number: _____

Last 4 of SSN: _____ Daytime Phone Number: _____

2. **Investment Information** Purchase of New Units/Shares an Additional Capital Call investment

Name of Entity: _____ Funds due by: _____

Total Investment: \$ _____ Price per Unit/Share: \$ _____ Number of Unit/Shares: _____

3. Company Information (IRA Club may contact them for additional documents to complete the administrative review.)

Name of Contact Person: _____ Phone Number: _____

Email: _____

4. Prohibited Transaction Questionnaire

Are you or any family member an officer, director or employee of the entity? _____

Do you or any family member own more than 50% of the entity? _____

Are you or any family member a main decision maker for the entity? _____

Will you or any family member receive any personal gain (including compensation) from this entity? _____

Continued on next page.

Fax to 312-283-2615

Email: investments@iraclub.org

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



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5. Funds Delivery Instructions

Mail a Check (\$15) Payee Name & Address: _____

Send a Wire Transfer (\$35)

Bank Name	Phone Number
Name on Account	Account #
ABA #	Account Holder Address

6. Investment Processing Fees are deducted from the account automatically. This asset is subject to a one time buy fee of \$50 and an annual asset fee of \$125. If you wish to put the fees on a credit card, please complete the section below.

Card Number: _____ Exp: _____ CVV: _____ Billing Zip: _____

8. Acknowledgements and Signature

**initial
below**

1. I acknowledge that I am the owner of the IRA account and I am solely responsible for selecting and reviewing the investments for my IRA account.
2. I understand that The IRA Club is not affiliated with the management or sale of the investments I select and does not review or provide advice on the risk or merit of the IRA investments I select.
3. I have taken time to think about this investment and hereby represent that The IRA Club may hold title to this asset for the benefit of my IRA account.
4. I understand that The IRA Club is not responsible nor is required to take legal action if my IRA investment should become default, frauded, bankrupt or other legal process.

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- _____ 5. I understand that all expenses be paid from my IRA. Sufficient funds must be held in custodial cash. If such funds are not available to pay an expense, I will be responsible for any penalty incurred. The IRA Club does not monitor expenses due for IRA assets.
- _____ 6. I represent that the investment is not a prohibited transaction as defined in the Internal Revenue Code.
- _____ 7. I acknowledge that this investment is not insured by the FDIC.
- _____ 8. I understand that I must provide an appraisal of the entity for any request I make that may be a taxable event. I will provide The IRA Club with an annual fair market value of my loan investment.
- _____ 9. I now and forever, Hold Harmless the IRA Club and its employees should the entity refuse or be unable to honor any portion of any payment or income due on the above captioned investment.
- _____ 10. Lastly, you understand that if this promissory note states NO security of payment (i.e. no collateral), that this type of unsecured loan can have more risk for the lender (your IRA account) than a secure note due to lack of collateral in case of default.

Signature: _____ **Date:** _____

Reminder: If your IRA will be collecting payments for this asset, funds must be deposited in the form of a check, ACH or wire transfer. Checks are made payable to your account as follows: IRA Club FBO (Your Name) IRA (Account #)