



PO Box A3535  
Chicago, IL 60690  
[www.iraclub.org](http://www.iraclub.org)  
312-795-0988

# REAL ESTATE INVESTMENT DIRECTIONS

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

## 1. Account Owner Information

First and Last Name: \_\_\_\_\_ IRA Club Account Number: \_\_\_\_\_

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

## 2. Investment Instruction (select one)

I instruct IRA Club to:  Make a New Cash Purchase  Send an Earnest Money Deposit

Amount to Send: \$ \_\_\_\_\_ Closing Date: \_\_\_\_\_ Percentage of Ownership: \_\_\_\_\_%

## 3. Property Information

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

## 4. Closing Agent

Company/Agent Name: \_\_\_\_\_ Phone: \_\_\_\_\_

## 5. Funds Delivery Instructions (select one)

**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 \$75 and to an annual asset fee of \$165. If you wish to put the fees on a credit card, please complete the section below.

Card Number: \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_ Billing Zip: \_\_\_\_\_

**Fax to** 312-283-2615

**Email:** [investments@iraclub.org](mailto:investments@iraclub.org)

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



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**7. Financing Instructions** (Complete section if the IRA is obtaining a mortgage for this property.)

Lender Name	Loan Number
Address	Phone Number

I will setup an automatic payment for the loan through my IRA account.

A property management company will make the note payments.

**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 agree to release, indemnify and hold harmless The IRA Club and its employees from any claims that may arise from investments I select.
4. I have taken time to perform due diligence on this investment and hereby represent that The IRA Club may hold title to this property for the benefit of my IRA account.
5. 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.
6. I understand that all real estate expenses (i.e. tax bills, insurance premiums, association payments, utility bills, repairs, improvements) must be paid from my IRA. Sufficient funds must be held in the IRA. 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 this real estate investment.
7. I represent that the investment is not a prohibited transaction as defined in the Internal Revenue Code.
8. I acknowledge that this investment is not insured by the FDIC.
9. I understand that I must provide an appraisal of the real estate for any request I make that may be a taxable event. I also acknowledge that I will provide The IRA Club with an annual fair market value of my real estate investment.

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

Reminder: If your IRA will be collecting rental income for this property, 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 #)

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