



# Investment Directions Form

## Private Placement

**Use this form to instruct your IRA to invest in a private placement investment.**

We encourage you to start this process at least one week in advance.

Return this form along with any other required documents to:

**Remember**, the IRA is the Investor and Owner Vesting is:

*IRA Club, Administrator & Meridian Bank, Custodian FBO (Account Owner Name) IRA (Account Number)*

► **Secure Upload:** link on [iraclub.com](https://iraclub.com)

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

For support, call **(312) 795-0988**. Office hours are Monday-Friday, 9:00 AM – 4:00 PM. Find information online at [www.iraclub.com](https://www.iraclub.com)

☐ Next Day Service (\$175) – Must Receive By 2 PM CT  ☐ Same Day Service (\$275) – Must Receive By 12 PM CT

### 1 ACCOUNT OWNER

FIRST AND LAST NAME	IRA CLUB ACCOUNT NUMBER
EMAIL ADDRESS	MOBILE PHONE NUMBER

### 2 INVESTMENT INSTRUCTIONS

Enter in the number of shares and total investment amount.

AMOUNT TO INVEST \$	NUMBER OF UNITS	PRICE PER UNIT / SHARE
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FUND / OFFERING NAME	
FUND POINT OF CONTACT	EMAIL ADDRESS

Please sign the offering agreements as “Read and Approved”. An authorized signer at IRA Club will countersign the agreements on behalf of the IRA account. Once the investment is processed, IRA Club will forward executed copies to the point of contact you provide via email.

### 3 FUNDING INSTRUCTIONS FOR A WIRE TRANSFER

CREDIT ACCOUNT NUMBER	ABA ROUTING NUMBER
CREDIT ACCOUNT NAME	RECEIVING BANK NAME
CREDIT ACCOUNT HOLDER ADDRESS	RECEIVING BANK ADDRESS
REFERENCE / MEMO	



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### OR REQUEST IRA CLUB TO SEND A PAPER CHECK

☐ USPS Mail ☐ FedEx Overnight (+\$75) - *Optional*

MAKE CHECK PAYABLE TO
RECIPIENT ADDRESS

### 4 INVESTMENT PROCESSING FEES

☐ Deduct Fees from Account ☐ Charge Credit Card

NAME ON CREDIT / DEBIT CARD	BILLING ZIP CODE	
CREDIT / DEBIT CARD NUMBER	EXPIRATION DATE	CVV CODE

### 5 ACKNOWLEDGEMENT AND SIGNATURE

By signing below, I agree to the following terms and conditions:

- I am the owner of the above-captioned IRA Club account.
- I am responsible for selecting and reviewing the investments for my account.
- IRA Club does not provide investment advice, risk analysis, suitability, viability, or merit review of the IRA investments.
- I will not receive any personal benefit from this investment.
- I release, indemnify, and agree to hold harmless and defend IRA Club if my investment or sale of an asset according to my directions violates any federal law, state law, or IRS regulation.
- I have performed due diligence on this investment and agree that IRA Club may hold title to the asset for the benefit of my IRA account.
- I understand that IRA Club is not responsible for taking legal action if my investment becomes defaulted, fraudulent, bankrupt, or subject to other legal processes.
- I agree that this investment is not a prohibited transaction as defined in the Internal Revenue Code.
- I acknowledge that the Federal Deposit Insurance Corporation (FDIC) does not insure this investment.
- I agree to provide an appraisal of the investment for any request that may be a taxable event.
- I also agree to provide IRA Club with an annual fair market value.
- I agree that IRA Club is not responsible for documents that I do not provide to process my investment direction.
- I have read and examined the IRA Custodial Account Agreement (5305), Account Disclosure, and IRA Club Fee Schedule on [www.iraclub.com](http://www.iraclub.com)

Sign Here

ACCOUNT OWNER'S SIGNATURE	DATE SIGNED
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