



# Investment Directions Form Real Estate

**Use this form to instruct your IRA to buy a real estate 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 Buyer and Owner Vesting is:  
*IRA Club FBO (Account Owner Name) IRA (Account Number)*

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

**Select One:**

- All Cash Purchase     All Cash Purchase with Multiple Buyers     Make an Earnest Deposit

AMOUNT TO SEND \$	SHARE OF OWNERSHIP %	CLOSING DATE
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PROPERTY ADDRESS	COUNTY
CITY, STATE, ZIP CODE	ASSESSOR PARCEL NUMBER (APN)

TITLE COMPANY / CLOSING AGENT NAME	PHONE NUMBER	EMAIL ADDRESS
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## 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

Processing fees deduct automatically from the IRA Club account. You may complete the credit card information below if you want to charge the fees instead.

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

## 5 ACKNOWLEDGEMENT AND SIGNATURE

I certify that I own the above-captioned IRA Club account by my signature below. I am responsible for selecting and reviewing the investments for my account, and I understand IRA Club is not an affiliate with the management, purchase, or sale of any investments. IRA Club does not provide investment advice, risk analysis, suitability, viability, or merit review of the IRA investments. I warrant that I am not receiving 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 hereby represent that IRA Club may hold title to this property for the benefit of my IRA account. I understand that IRA Club is not responsible or required to take legal action if my investment becomes default, fraud, bankrupt, or endure other legal processes. The IRA must pay all real estate expenses (i.e., tax bills, insurance premiums, association payments, utility bills, repairs, and improvements). I will be responsible for any penalty if such funds are unavailable to pay an expense. IRA Club does not monitor costs due.

I represent that the investment is not a prohibited transaction as defined in the internal revenue code. I acknowledge that the FDIC does not insure this investment. 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 IRA Club with an annual fair market value. I agree that the IRA Club cannot be held responsible for documents I do not provide to process my investment direction. I agree to the terms outlined and 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).



ACCOUNT OWNER'S SIGNATURE	DATE SIGNED
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