



# ESTABLISHING A SELF DIRECTED IRA NEW ACCOUNT INSTRUCTIONS

## SUBMIT TO

### EMAIL

[newaccounts@iraclub.org](mailto:newaccounts@iraclub.org)

### MAIL

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

### FAX

312-283-2615

**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 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

## HOW TO FUND THE IRA

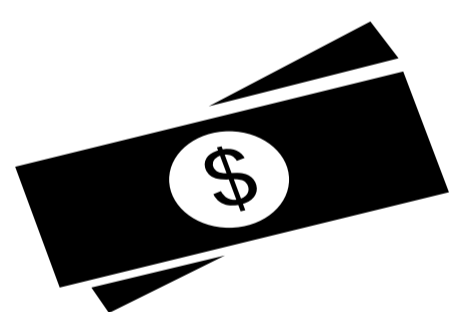
- IRA to IRA Transfer
- Rollover from a 401(k), 403b, 457a, TSP or Pension
- Annual Contribution

## RESOURCES

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



O P E N



F U N D



I N V E S T