

SELF DIRECTED SOLO 401(K)

Custodial Fee Schedule



Membership \$395

*Due upon account opening
and annually thereafter.*



Per Holding \$195

*Due at the time of purchase
and annually thereafter.*

Transaction Processing

Buy/Sell/Transfer Asset	\$100
Buy/Sell/Transfer Real Estate	\$175
Earnest Money Deposit	\$75
Leveraged Real Estate	\$225

Banking

Recurring Distribution via ACH	\$5
Withdrawal via Check	\$15
Wire In/Out	\$25/\$35
Void/Stop Payment	\$35

Miscellaneous

Promissory Note Modification	\$50
FedEx Overnight	\$75
Roth Conversion	\$100

Always Included

Plan Documents	\$0
Form 5500 & 1099R Filing	\$0
Allowable Transaction Analysis	\$0

Effective 4/01/2024, please note that each account must maintain a minimum \$500 cash balance. Should the cash balance fall below the minimum required, a \$100 low balance penalty will be charged at the time of renewal. Fees are automatically deducted from the account, and members may opt to charge fees to a credit or debit card.

Additional miscellaneous fees include but are not limited to a 3.5% fee for contributions via credit card, void/stop payment fee, incomplete or late Fair Market Valuation form (\$175), leveraged real estate (\$225), international wires (\$90), buy/sell/transfer offshore real estate (\$495.00), offshore real estate holding fees (\$395), and account termination (\$325). Depository storage fees for precious metals may apply. A copy of our current fee schedule is available on our website, iraclub.com. Fees are subject to change.