

**1 - Is Your Contact Information Current?**  Yes  No

If you have moved or changed your phone or email address, it is important to update all vendors/partners associated with your Checkbook IRA.

Help Resources: <https://bit.ly/2WTTu31>

**2 – Is Your LLC In Good Standing with the State?**  Yes  No

Search for your LLC on the state corporation division website to view the status.

Seek guidance from the state or local counsel if your LLC is late on renewal or needs to resolve an administrative dissolution.

**3 – Is LLC Registered Agent Info Correct?**  Yes  No

Search for your LLC on the state corporation division website to view the registered agent.

Use state provided forms to make changes to the agent name or agent address if necessary.

Contact Safeguard Advisors Support if you have a more complex issue, such as having moved out of state and needing to designate a commercial registered agent.

**4 – Fees Current with Commercial Registered Agent?**  Yes  No

If you have a commercial registered agent, check to ensure the relationship is active, they have your current address on file, and that your LLC is current on fees due.

[www.blumbergexcelsior.com](http://www.blumbergexcelsior.com)  
[www.registeredagentsinc.com](http://www.registeredagentsinc.com)

**5 – Can You Access Forge Trust Co. Online Dashboard?**  Yes  No

Visit <https://account.forgetrust.com> to login.

Help Resources: <https://bit.ly/2WQcrnc>

**6 – Is Your IRA Valuation Current?**  Yes  No

You can view the last reported valuation for your LLC by logging into the online dashboard, then clicking on the hyperlinked dollar value to the right of your LLC name.

Enter valuation at <https://valuation.forgetrust.com>

**7 – Is Your IRA Current on Fees and Cash Balance?**  Yes  No

You can view the Custodial Cash Balance on your online dashboard.

Help Resources: <https://bit.ly/2JpuLM7>

**8 – Are Beneficiary Designations Current?**  Yes  No

You can view beneficiary designations on your online dashboard.

Change Beneficiaries: <https://bit.ly/2QXLI9V>