

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

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

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

3 – Is Your IRA Valuation Current? Yes No

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

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

4 – 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>

5 – Are Beneficiary Designations Current? Yes No

You can view beneficiary designations on your online dashboard.

Change Beneficiaries: <https://bit.ly/2QXLl9V>