

Migrating a Checkbook IRA to IRA Resources

IRA Resources is a quality provider of the required IRA custodial services associated with the Checkbook IRA platform. Their customer service is responsive, friendly, and knowledgeable. Their service is prompt, and their fees are quite reasonable.

Following is the process we will execute to move your current IRA LLC or IRA Trust from your current IRA custodian to IRA Resources.

The entire process can take 4-6 weeks to complete. You can continue to operate the plan and investments during this time.

Preparing your Entity for Transfer

We'll start by helping to get your current entity and IRA account prepared for transfer. This involves providing a current valuation and making sure you are current on fees.

Information specific to your plan type and current custodian will be provided once we have received this application.

The Transfer Process

- 1) We'll help you get your current entity prepared for transfer.
- 2) We'll assist you with establishing your new IRA with IRA Resources.
- 3) We'll prepare amended operating documents for your entity and an IRA Resources Transfer form.
- 4) We'll present transfer documents to IRA Resources for processing.
- 5) IRA Resources will work with your current custodian to have the entity transferred.

Returning Paperwork to Safeguard

The following invoice for our services may be returned electronically or by mail/courier to Safeguard Advisors.

Secure Upload: www.ira123.com/secure-upload

Fax: 888-456-5303

Mail: Safeguard Advisors
PO Box 2050
Wenatchee, WA 98807-2050

We recommend against sending sensitive information via PDF attachment to an email as that is not secure.



Custodian Change invoice

SAFEGUARD SERVICES	AMOUNT
Change IRA custodian to IRA Resources	\$100.00

Current Plan

Entity Type: LLC Trust

Entity Name: _____

Current Custodian: Forge Trust Co. Kingdom Trust Co.

Concierge Service

Please upgrade to expedited Concierge service for an additional \$99.00.

Acknowledgements

I have read and agree to the Safeguard Custodian Change Terms of Service.

I acknowledge and accept that a \$199 per year IRA Administration fee subscription will be established beginning in the first anniversary month of plan setup and every year thereafter.

Payment Method

Fees for this service may be paid personally or from the current Checkbook IRA account.

Pay by Check *(Please mail application to address below)*

Card Type: Visa M/C Amex Discover

Cardholder Name: _____

Card#: _____

Expiration Date: _____ Security Code: _____

Billing Address: _____

Signature: _____

Safeguard Advisors Processing: PO Box 2050, Wenatchee, WA 98807

Tel 877-229-9763 Fax 888-456-5303 Secure Upload <https://ira123.com/secure-upload>