

SDIRA Qualification Form

Please provide the following information to determine if you qualify for a Self-Directed IRA. Email the scanned copy of the completed form to SDIRAQ@TheAdvancementGroup.com if not completed in person.

Full name: _____ Date of birth: _____

Spouse's full name: _____ Date of birth: _____

Best phone number and best time to contact you: _____

Your physical address: _____

Your primary email address: _____

Your income: \$ _____ Your spouse's income: \$ _____

Type of your current retirement account(s):

- | | |
|--|--|
| <input type="checkbox"/> Traditional IRA | <input type="checkbox"/> Qualified Plan |
| <input type="checkbox"/> Roth IRA | <input type="checkbox"/> Keogh |
| <input type="checkbox"/> Simple IRA | <input type="checkbox"/> Coverdale Education Savings (ESA) |
| <input type="checkbox"/> SEP IRA | <input type="checkbox"/> Profit Sharing Plans |
| <input type="checkbox"/> 401(k) | <input type="checkbox"/> Money Purchase Plans |
| <input type="checkbox"/> 457(b) | <input type="checkbox"/> Government Eligible Deferred Compensation Plans |
| <input type="checkbox"/> 403(b) | |

Expected Return of Investment of your current retirement account: _____

Your existing Custodian/Administrator: _____

How much is contributed to a 401(k)? Self _____ Employer _____

Balance(s) of the account(s) to be moved: _____

How many beneficiaries will your IRA have? _____

Reason for moving your current retirement account: _____

Which type of investment do you prefer?

- | | |
|--|---|
| <input type="checkbox"/> First Lien Notes Secured by Real Estate | <input type="checkbox"/> Real Estate Investments for Resale |
| <input type="checkbox"/> First Trust Deeds | <input type="checkbox"/> Real Estate Investments for Rental Portfolio |
| <input type="checkbox"/> Property Tax Loans | <input type="checkbox"/> Real Estate Investments for Owner Financed Sales |
| <input type="checkbox"/> Other _____ | |