Self Directed IRA Cheklist

“Questions to Ask your IRA Custodian”

# Getting to know the Company

Are you a Self Directed IRA Custodian or Administrator?

How much experience does your company have with self-directed IRAs

Is your self directed Custodian or Administrator regulated? How Frequently? By Who?

When is the last time your firm was Audited by a regulator?

How many clients does your firm provide custody or administrative services for?

Does your company have any industry affiliations?

What Account types do you have available?

# Getting to know their Finacial requirements

What does your company charge for fees?

How does your company charge their fees?

What procedures does your company have in place for annual valuations?

# Getting Account Specific

What ways can I access my account?

What is the average turnaround time for opening a new account?

What is the average turnaround time for investing in a new asset?

How many employees do you have on your client service team?

Are my accounts insured? What type of insurance is provided? How much coverage do you have?

Who would be the qualified custodian providing custody for my self-directed IRA?

# Discussion Notes: