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: