

## General Buy Direction Instructions

### Form Use

Use this form when investing in promissory notes NOT collateralized by real estate. If you need assistance completing the forms, please call us at:

888-322-6534 option 1

### Fees and Processing

Asset purchase fee: \$50

Check fee: \$7

Wire fee: \$30

Overnight delivery: \$30 *(if requested)*


Expedited review fee: \$100 *(if requested)*

IRAR processing time: 2-3 Days

### Submission Options

 **Email**  
forms@iraresources.com

 **Fax**  
858-459-6565

 **Mail**  
IRA Resources, Inc.  
1000 Broadway, Suite 350  
Oakland, CA 94607

### IMPORTANT

You must have enough funds in your account to cover the purchase of the investment and transaction fees. Lack of funds will delay your purchase.

### Instructions

It is imperative that all purchase documentation are properly titled/vested in the name of the IRA.

**Example:** IRAR Trust FBO [Client Name, Account#]

Use IRAR Trust Co. information when a purchaser's Tax ID or physical address is required on the documents.

**IRAR Trust Co. Tax ID: 83-1624780**

IRA Resources, Inc.

1000 Broadway, Suite 350

Oakland, CA 94607

**Do not sign supporting documents or agreement where a purchaser's signature is required.**

IRAR must sign all documentation for the purchase on behalf of the client's account. Mark the Purchase Agreement and other documents as "*read and approved*" with your signature at the top of every page where a signature is needed before submitting to IRAR.

**Example:** *Read and Approved: John Doe*

### Required Documentation For Transaction

All Buy Direction Letters must be accompanied by supporting documentation.

**For example:**

Unsecured Promissory Note: *Original Note*

Purchase of Cattle: *Contract or Purchase Agreement*

**NOTE:** IRAR may reject the Buy Direction Letter if we identify that you are engaging in a prohibited transaction. These include, but are not limited to:

- Receiving compensation or reimbursement from the investment entity
- Self-dealing
- Managing the investment

See IRS **Code 4975** for information on prohibited transactions.



IRA RESOURCES, INC.

General Buy Direction Letter

1. ACCOUNT OWNER INFORMATION

Form with fields: Full Name (as it appears on your account application), Account Number, Account Type (checkboxes for Traditional, Roth, SEP, SIMPLE, HSA, ESA), Email Address, Daytime Phone Number.

2. REVIEW AND PROCESSING

Form with question: How Do You Want IRAR to Review Your Transaction? (NOTE: The review request does not guarantee the completion of the transaction). Includes checkboxes for Normal Review Request and Expedited Review Request (\$100) with associated document review timelines.

3. TRANSACTION ACKNOWLEDGEMENT

Form with text: Read the Information Below and Initial to Acknowledge. Includes a list of disqualification conditions and an initialing line: Initial Here: [arrow] \_\_\_\_\_ By initialing, I acknowledge that I have read and understand the transaction information above.

4. INVESTMENT INFORMATION

Form with text: Indicate the Type of Purchase and Complete the Section for Your Asset Type. Includes checkboxes for New Purchase, Additional Funding, and Exchange. Contains sections for Stocks, Bonds, or Other Securities (with CUSIP, Ticker Symbol, Buy at options) and Promissory Note (with Unsecured/Secured options, Quantity, Price, Total Purchase, and Discounted status).



IRA RESOURCES, INC.

General Buy Direction Letter

Note Payment Schedule
Amortized Interest Only Balloon at Maturity
Monthly Quarterly Annually Other— please specify
Maturity Date Interest Rate Payment Amount
\$

5. BORROWER INFORMATION

Borrower 1: Full Name Email Address Phone Number
Street Address City State Zip
Borrower 2: Full Name Email Address Phone Number
Street Address City State Zip

6. DELIVERY INSTRUCTIONS

How Would You Like to Have the Funds Delivered? (check one)
1. Wire
Bank Name Bank ABA/Routing Number
Account Name Account Number
Reference Number
2. Check 3. Cashier's Check (overnight delivery required)
Payee Name Phone Number (required for cashier's check)
Payee Street Address City State Zip
How Would You Like the Check Delivered?
First Class Mail Overnight Delivery (additional fee applies) Bill to Third Party — Overnight Delivery
FedEx UPS (provide account #):
Mail Check to an Address Different From Payee (enter name below) Phone Number (required for overnight check)
Street Address City State Zip



IRA RESOURCES, INC.

General Buy Direction Letter

7. PAYMENT OF IRAR FEES

How Will You Pay for Transaction Fees?
If credit card is declined, fees will be debited from IRA. Transaction will NOT be processed unless fees are paid.
Debit IRAR Account Credit Card (complete credit card information below)
Credit Card Type
Name As it Appears on the Card Card Number Expiration Date Security Code
Billing Address Billing City Billing State Billing Zip
Signature Date

8. ACCOUNT OWNER SIGNATURE AND INVESTMENT ACKNOWLEDGMENT

\*For loans secured by assets other than real estate, IRAR Trust Company needs backup documentation (ex. UCC1 Financing Statement, Security Agreement, etc.) to book the loan as secured. Failure to supply the backup documentation will result in the loan being record kept as an unsecured loan.
Prior to funding, all transaction documents must be notated "read and approved" with your signature and date (for example: subscription documents, promissory notes).
I understand that my account is self-directed and that IRAR Trust Company is acting solely as a passive custodian to hold retirement account assets and in no other capacity.
I understand that no one at IRAR Trust Company has authority to agree to anything different than my foregoing understandings of IRAR Trust Company's policy. If any provision of this Buy Direction Letter is found to be illegal, invalid, void, or unenforceable, such provision shall be severed and such illegality or invalidity shall not affect the remaining provisions, which shall remain in full force and effect. I declare that I have examined this document, including accompanying information, and to the best of my knowledge and belief, it is true, correct and complete.
Transactions with insufficient funds will not be processed until sufficient funds are received. If fees are being deducted from your account, the full amount of the transaction plus fees must be available before your transaction can be processed.
IRAR Trust Company does not provide tax, legal, or investment advice. It does not endorse or recommend any agent, company, or specific investment. Any information communicated by IRAR Trust Company is solely for educational purposes and should not be construed as tax, legal, or investment advice. Consultations with tax, legal, and investment professionals is advised prior to making any decisions regarding your account.
I have read and understand the disclosure above.

SIGNATURE DATE