

## Real Estate Purchase Offer Review Instructions

### Form Use

Use this form to expedite the review of your real estate purchase offer.

If you need assistance completing the form, please call us at:

**888-322-6534 option 1**

### Fees and Processing

Processing fee: \$0

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

IRAR processing time: 24 hours

### Submission Options



#### Email

forms@iraresources.com



#### Fax

858-459-6565



#### Mail

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

### Instructions

Provide a copy of this document to the party(ies) responsible for creating the offer and purchase contract documentation.

Submit this form to IRAR with your real estate purchase offer. It is imperative that all documents are properly titled/vested in the name of the IRA.

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

**Do not sign the documents where a buyer's signature is required.** IRAR Trust must sign all documentation for the purchase on behalf of the client's 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

### Required Documentation

- Real Estate Purchase Offer
- IRAR Real Estate Purchase Offer Review Form

### IMPORTANT

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



IRA RESOURCES, INC.

Real Estate Purchase Offer Review

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. TRANSACTION ACKNOWLEDGEMENT

Read the Information Below and Initial to Acknowledge

- Any disqualified party to the IRA may not receive compensation for providing services on this transaction (see IRS Code Section 4975)
Personal funds cannot be used for the Earnest Money Deposit (EMD). Deposit funds must come from the IRA account
Account must have sufficient funds available before the transaction can be processed
If the IRA is partnering with another party(ies) in the purchase, add the divided ownership percentage to the vesting/title

Initial Here: [arrow] \_\_\_\_\_ By initialing, I acknowledge that I have read and understand the transaction information above

3. INVESTMENT INFORMATION

Form with fields: Property Address, City, State, Zip

4. READ AND APPROVED CONTRACT ACKNOWLEDGEMENT

Review the Purchase Offer and Initial Below

IMPORTANT: Do not sign the purchase offer where a signature is required, IRAR must sign all documentation for the purchase on behalf of the client's account.

Initial Here: [arrow] \_\_\_\_\_ By initialing, I acknowledge that I have read and approved the offer being submitted for review

5. PROPERTY VESTING/TITLE

The Purchase Offer Must Reflect The IRA as the Buyer (check one)

Correct Vesting/Title: IRAR Trust FBO [Your name and account number]

- [checkbox] This offer has the correct vesting/title in the name of IRA owner
[checkbox] Attached is the addendum/amendment to the contract that states the correct vesting/title for the buyer, which has been signed by all parties involved in this transaction

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## 6. ACCOUNT OWNER'S AGENT / ATTORNEY INVOLVED IN TRANSACTION

List the Name of Professional/Party Involved in This Transaction (to help expedite processing)

Full Name	Company	Title	Phone Number
Email Address		Fax	

## 7. ACCOUNT OWNER SIGNATURE AND ACKNOWLEDGEMENT

Prior to funding, all transaction documents must be notated "read and approved" with your signature and date (for example: purchase contract, promissory notes, etc.).

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. IRAR Trust Company will not review the merits, legitimacy, appropriateness, and/or suitability of any investment in general, including but not limited to: any investigation and/or due diligence prior to making any investment, or in connection with my account in particular. I acknowledge that I have not requested that IRAR Trust Company provide, and IRAR Trust Company has not provided, any advice with respect to the investment directive set forth in this Buy Direction Letter. I understand that it is my responsibility to conduct all due diligence, including but not limited to: search concerning the validity of title, and all other investigation that a reasonably prudent investor would undertake prior to making any investment. I understand that IRAR Trust Company will not determine whether this investment is acceptable under the Employee Retirement Income Securities Act (ERISA), the Internal Revenue Code (IRC), or any applicable federal, state, or local laws, including securities laws. I understand that it is my responsibility to review the risks associated with this investment and I performed the due diligence I deemed necessary on the investment itself to ensure compliance with these requirements. I also understand and agree that IRAR Trust Company will not be responsible to take any action should there be any default with regard to this investment.

I understand that IRAR Trust Company is not a "fiduciary" for my account and/or my investment as such terms are defined in the IRC, ERISA, and/or any applicable federal, state, or local laws. I agree to release, indemnify, defend, and hold IRAR Trust Company, and its respective officers, directors, managers, members, employees, agents, owners, representatives, affiliates, and successors harmless from any claims, including but not limited to: actions, liabilities, losses, penalties, fines, and/or claims by others, arising out of this Buy Direction Letter and/or this investment, including but not limited to: claims that an investment is not prudent, proper, diversified or otherwise in compliance with ERISA, the IRC and/or any other applicable federal, state, or local laws. In the event of claims by others related to my account and/or investment wherein IRAR Trust Company is named as a party, IRAR Trust Company shall have the full and unequivocal right at their sole discretion to select their own attorneys to represent them in such litigation and deduct from my account any amounts to pay for any costs and expenses, including but not limited to: all attorneys' fees, costs, and internal costs (collectively "Litigation Costs"), incurred by IRAR Trust Company in the defense of such claims and/or litigation. If there are insufficient funds in my account to cover the Litigation Costs incurred by IRAR Trust Company, on demand, I will promptly reimburse IRAR Trust Company the outstanding balance of the Litigation Costs. If I fail to promptly reimburse the Litigation Costs, IRAR Trust Company shall have the full and unequivocal right to freeze my assets, liquidate my assets, and/or initiate legal action in order to obtain full reimbursement of the Litigation Costs.

I confirm that this purchase does not include any illegal or impermissible investments under South Dakota or Federal law, including, but not limited to, holdings of marijuana or other illegal substances, illegal gambling, or illegal artifacts.

I am directing IRAR Trust Company to complete this transaction as specified above. I confirm that the decision to buy this asset is in accordance with the rules of my account, and I agree to hold harmless and without liability IRAR Trust Company under the foregoing hold harmless provision. 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.

ACCOUNT OWNER SIGNATURE	DATE
➔	

## Submission Options

FAX	EMAIL	MAIL
(858) 459-6565	forms@iraresources.com	IRA Resources 1000 Broadway, Suite 350 Oakland, CA 94607