ENTITY INVESTMENT ISSUER WORKSHEET

To be completed by an authorized representative on behalf of the entity investment issuer.

iPlanGroup
RETIREMENT DRIVEN BY YOU

CLEAR FORM

1. iPLANGROUP ACCOUNT OWNER INFORMATION

Account Owner Name	iPlanGroup Account Number

2. INVESTMENT OFFERING INFORMATION

ENTITY TYPE

- ☐ Limited Liability Company
- ☐ C-Corporation
- ☐ Other: ______________________
- ☐ Limited Partnership
- ☐ Joint Venture
- ☐ Land Trust

Name of Entity/Organization Offering the Investment	Full Name of Offering		

Entity Contact Person (Full Name)	Phone Number	Email Address

Entity Street Address	City	State	Zip Code

ARE SHARES CONVERTIBLE?

☐ Yes ☐ No *If yes, convertible into:* ______________________

INVESTMENT DOCUMENTATION

Please indicate supporting documents pertaining to the entity and investment, as well as if signature execution is needed:

- ☐ **Limited Partnership Agreement**
  - ☐ *IRA Owner Must Sign*
  - ☐ *iPlanGroup Must Sign*
- ☐ **Subscription Agreement**
  - ☐ *IRA Owner Must Sign*
  - ☐ *iPlanGroup Must Sign*
- ☐ **Joint Venture Agreement**
  - ☐ *IRA Owner Must Sign*
  - ☐ *iPlanGroup Must Sign*
- ☐ **Operating Agreement**
  - ☐ *IRA Owner Must Sign*
  - ☐ *iPlanGroup Must Sign*
- ☐ **Land Trust Agreement**
  - ☐ *IRA Owner Must Sign*
  - ☐ *iPlanGroup Must Sign*
- ☐ **Investor/Purchaser Questionnaire**
  - ☐ *IRA Owner Must Sign*
  - ☐ *iPlanGroup Must Sign*
- ☐ **Private Placement Memorandum**
- ☐ **Articles of Organization**
- ☐ **Offering Circular**
- ☐ **Bylaws**
- ☐ **Stock Certificates**

☐ **Other**, *Please list:* ______________________ ☐ *IRA Owner Must Sign* ☐ *iPlanGroup Must Sign*

3. INVESTMENT ISSUER ACKNOWLEDGEMENT AND AGREEMENT

The role of IRA Plan Partners, LLC DBA iPlanGroup as administrator of self-directed accounts is nondiscretionary and/or administrative in nature. The account owner or his/her authorized representative must direct all investment transactions and choose the investment(s) for the account. IRA Plan Partners, LLC DBA iPlanGroup has no responsibility nor involvement in selecting or evaluating any investment. It neither endorses nor recommends investments in any asset and does not provide any legal, tax, investment or any other advice with respect to any investment, and Issuer agrees to make no representation to the contrary. Issuer further acknowledges that IRA Plan Partners, LLC DBA iPlanGroup's acceptance of an asset indicates only that the asset meets the requirements of IRA Plan Partners, LLC DBA iPlanGroup's existing system and procedures, and in no way can be construed to be either an endorsement or evaluation of merit nor an acknowledgement that the asset has been approved by any regulatory or supervisory body. IRA Plan Partners, LLC DBA iPlanGroup collects the information below solely for administrative review purposes.

The Issuer hereby agrees, represents and/or acknowledges the following to IRA Plan Partners, LLC DBA iPlanGroup:

Upon purchase of the asset being funded or its re-registration, Issuer will provide IRA Plan Partners, LLC DBA iPlanGroup with proof of ownership of said asset within 60 days of receipt of purchase funds or request for re-registration. Proof of ownership may be in the form of an original stock certificate, executed subscription documents or by other means acceptable to IRA Plan Partners, LLC DBA iPlanGroup. Issuer further acknowledges that failure to do so may cause IRA Plan Partners, LLC DBA iPlanGroup to distribute the asset which may result in a taxable event to the account owner.

The ownership interest and/or certificates will be correctly registered as follows:

FOR A TRADITIONAL IRA, ROTH IRA, SEP IRA, SIMPLE IRA, CESA OR HSA:
iPlanGroup Agent for Custodian FBO [*Account Owner Name or Account Number*] [*Account Type*]
28011 Clemens Road, Suite B, Westlake OH 44145
Tax ID# 46-4246162

FOR AN INDIVIDUAL 401(K) OR INDIVIDUAL ROTH 401(K):
[*Trustee Name*] TTEE [*Plan Name*] 401k FBO [*Plan Participant Name or Account Number*] C/O iPlanGroup
28011 Clemens Road, Suite B, Westlake OH 44145
Tax ID# 46-4246162

Account owners will be provided offering documentation including but not limited to private placement memoranda, prospectuses, operating agreements and subscription agreements as appropriate for the investment in the asset.

If applicable, Issuer will inform account owners that the investment may generate unrelated business taxable income (UBTI). If UBTI is generated, Issuer represents that UBTI information will be included on IRS form 1065 (Schedule K-1) and be provided to account owners each year.

Issuer will not use IRA Plan Partners, LLC DBA iPlanGroup's name in advertising, printed or web-based material or any other form of communication without its express written consent.

To the extent attributable to the fraud, negligence, or misconduct of the Issuer, Issuer will indemnify and hold IRA Plan Partners, LLC DBA iPlanGroup harmless from and against any and all damages, claims, losses, expenses or costs of any nature (including without limitation any court costs and attorney's fees) asserted against or incurred by IRA Plan Partners, LLC DBA iPlanGroup as a result of legal actions involving the investment or the asset.

All income related to the asset or associated with the investment will be sent directly to IRA Plan Partners, LLC DBA iPlanGroup in accordance with IRA Plan Partners, LLC DBA iPlanGroup's expense payment instructions in a timely manner for credit to the appropriate IRA Plan Partners, LLC DBA iPlanGroup account. In accordance to the internal revenue code, under no circumstances will the Issuer distribute any monies or assets directly to an IRA Plan Partners, LLC DBA iPlanGroup account owner personally. Issuer is solely responsible for any tax, legal, or penalty damages and charges associated with the direct distribution of any monies or assets by the Issuer to the account owner.

Issuer understands that account owners may need to re-register or sell part of the asset to meet required minimum distribution rules, if applicable. Issuer certifies that the asset is structured to permit such distributions.

Issuer will not accept any subscription document, change or registration request, or change of registered owner address, including dividend payment address, for any asset that lists IRA Plan Partners, LLC DBA iPlanGroup as administrator but does not bear an authorized signature of IRA Plan Partners, LLC DBA iPlanGroup and agrees to notify IRA Plan Partners, LLC DBA iPlanGroup immediately upon receipt of any such documents.

Issuer understands that the investment company's inability to price the asset annually, provide substantiation of value, provide investment confirmations or send distributions directly to IRA Plan Partners, LLC DBA iPlanGroup may result in loss of administrative feasibility by IRA Plan Partners, LLC DBA iPlanGroup. In this event, Issuer agrees that upon direction from IRA Plan Partners, LLC DBA iPlanGroup the asset will be reregistered to either the account owner personally, or to another administrator.

ISSUER REPRESENTATIVE AUTHORIZATION AND SIGNATURE

X		
Signature	*Print Name*	*Date*

IRA Plan Partners LLC DBA iPlanGroup ♦ 28011 Clemens Road ♦ Westlake, OH 44145
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