



GENERAL INVESTMENT KIT

Your complete guide to various investments from your retirement account including: Mobile Homes, Annuities, Oil and Gas, Structured Settlements, Lease Agreements, Options, Land Contracts, and Equipment Leasing.

GENERAL INVESTMENT AUTHORIZATION FORM

Use this form to complete the following types of investments from your retirement account: Mobile Homes, Annuities, Working Interest in Oil and Gas, Structured Settlements, Lease Agreements, Options, Land Contracts, and Equipment Leasings.



CLEAR FORM

1. ACCOUNT OWNER INFORMATION

ACCOUNT OWNER NAME	IPLANGROUP ACCOUNT NUMBER
EMAIL ADDRESS	PHONE NUMBER

2. INVESTMENT INFORMATION

DESCRIPTION OF INVESTMENT	AMOUNT OF INVESTMENT \$
PLEASE CHECK ONE OPTION <input type="checkbox"/> NEW PURCHASE <input type="checkbox"/> ADDITION TO EXISTING ASSET	PERCENTAGE OF ASSET TO BE OWNED BY YOUR IRA %

3. TYPE OF INVESTMENT (PLEASE SELECT ONE OPTION)

<input type="checkbox"/> MOBILE HOME	VEHICLE IDENTIFICATION # (VIN)	MAKE	MODEL	YEAR
<input type="checkbox"/> STRUCTURED SETTLEMENT	ADDRESS	CITY	STATE	ZIP CODE
<input type="checkbox"/> LAND CONTRACT	ADDRESS	CITY	STATE	ZIP CODE
<input type="checkbox"/> OPTION	ADDRESS	CITY	STATE	ZIP CODE
<input type="checkbox"/> ANNUITY	ANNUITY TYPE	ANNUITY PROVIDER		
<input type="checkbox"/> LEASE AGREEMENT	LEASE TYPE			
<input type="checkbox"/> OIL & GAS VENTURE	NAME OF VENTURE	INTEREST IN VENTURE		%
<input type="checkbox"/> OTHER	DESCRIPTION OF INVESTMENT			

4. INVESTMENT CONTACT INFORMATION

CONTACT PERSON NAME	
EMAIL ADDRESS	PHONE NUMBER

5. INVESTMENT FUNDING INSTRUCTIONS (PLEASE SELECT ONE OPTION)

FUND VIA CHECK

REGULAR CHECK CASHIER'S CHECK (\$30 FEE)
PLEASE NOTE, CASHIERS CHECKS MUST BE SENT VIA A TRACKABLE SHIPPING METHOD, SUCH AS OVERNIGHT MAIL.

IF REQUESTING A WIRE, PLEASE MOVE TO THE NEXT PAGE

MAKE CHECK PAYABLE TO	MAIL CHECK TO	INFORMATION TO BE REFERENCED	
STREET ADDRESS	CITY	STATE	ZIP CODE

DELIVERY OPTIONS

REGULAR MAIL OVERNIGHT MAIL (\$20 + COST) PICKUP AT IPLANGROUP LOCATION

THIRD PARTY UPS ACCOUNT # _____ THIRD PARTY FEDEX ACCOUNT # _____

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5. INVESTMENT FUNDING INSTRUCTIONS (CONTINUED)

FUND VIA WIRE (\$35 FEE) IF SENDING AN INTERNATIONAL WIRE, CHECK THIS BOX AND COMPLETE/ATTACH INTERNATIONAL WIRE INSTRUCTION FORM

BANK NAME	STATE	ZIP CODE	BANK PHONE NUMBER
ABA ROUTING NUMBER	ACCOUNT NUMBER		FOR CREDIT TO (ACCOUNT NAME)
FOR FURTHER CREDIT TO (NOT REQ.)	FOR FURTHER CREDIT ACCOUNT NUMBER		INFORMATION TO BE REFERENCED

6. INVESTMENT PROCESSING FEES (IF APPLICABLE)

DEBIT FEES FROM MY ACCOUNT CHECK ENCLOSED CHARGE NEW CREDIT CARD*

*If selecting the Charge Credit Card option, an online payment link will be sent to the E-mail address provided below prior to funding.

E-mail Address: _____

7. DOCUMENTS REQUIRING SIGNATURES

PLEASE LIST ALL DOCUMENTS RELATING TO THE INVESTMENT WHICH WILL REQUIRE A SIGNATURE FROM IPLANGROUP. REFER TO THE ORIGINAL NOTE AND/OR RECORDED MORTGAGE/DEED OF TRUST FOR PROPER TITLING OF THE LEGALIZED DOCUMENTS STATED IN THIS SECTION.

1.	3.
2.	4.

8. DOCUMENT DELIVERY INSTRUCTIONS (IF APPLICABLE)

PLEASE INDICATE BELOW HOW YOU WOULD LIKE THE ABOVE REFERENCED DOCUMENTS TO BE DELIVERED, ONCE SIGNED BY IPLANGROUP.

SEND BY MAIL REGULAR MAIL OUTSIDE UPS ACCOUNT # _____
 OVERNIGHT MAIL (\$20 Fee + cost) OUTSIDE FEDEX ACCOUNT # _____

MAIL TO	ATTENTION	INFORMATION TO BE REFERENCED	
ADDRESS	CITY	STATE	ZIP CODE
<input type="checkbox"/> SEND BY FAX <input type="checkbox"/> SEND BY EMAIL			
FAX NUMBER	NAME / ATTENTION	INFORMATION TO BE REFERENCED	
EMAIL ADDRESS	NAME / ATTENTION	INFORMATION TO BE REFERENCED	

9. ACCOUNT OWNER AUTHORIZATION AND SIGNATURE

General. By executing this Investment Authorization, I, the Account Owner, certify that I have read and understand the terms and conditions contained herein as well as the terms and conditions contained in my original account agreement and disclosures. I understand and agree that all of the following apply:

- 1) My account is self-directed and I, alone, am responsible for choosing any and all investments for my account;
- 2) I have done my due diligence on the investment I am hereby authorizing;
- 3) Neither IRA Partners LLC dba iPlanGroup ("Administrator") nor Fortis Bank ("Custodian") have provided any tax, legal or investment advice concerning the investment authorized herein;
- 4) I understand and agree that alternative investments, including, but not limited to investments in precious metals, real estate, promissory notes, and private equities, may involve a high degree of risk, including the potential loss of the entire investment; that these investments may be non-liquid; that these investments may be difficult to value; that these investments may include restrictions on their subsequent sale or transfer: and that there may be no secondary market upon which to sell these assets;
- 5) By executing this Investment Authorization, I hereby direct the Administrator to follow the instructions I have provided herein

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9. ACCOUNT OWNER AUTHORIZATION AND SIGNATURE (Cont.)

I understand that iPlanGroup ("Administrator") performs certain administration and record keeping duties in conjunction with my Self-Directed retirement Account (the "Account") on behalf of General. By executing this Investment Authorization, I, the Account Owner, certify that I have read and understand the terms and conditions contained herein as well as the terms and conditions contained in my original account agreement and disclosures. I understand and agree that all of the following apply:

Responsibilities of Administrator and Custodian. I acknowledge and agree that neither Administrator nor Custodian will be liable for any loss of any kind sustained by me or my account which results from my decision to purchase the investment which I am directing with this Investment Authorization (this "Investment"). I understand and agree that, in processing this Investment Authorization, Administrator and Custodian are acting only as my agent and at my explicit direction and that neither Administrator or Custodian have or will be construed as having any fiduciary status by any document or other statement, whether written or oral. I acknowledge that neither Administrator nor Custodian provide tax, legal or investment advice and I warrant and represent that I have received no such advice from either Administrator or Custodian. I certify that I have done my own due diligence investigation regarding the Investment prior to instructing Administrator to make the Investment, and I understand and agree that neither Administrator nor Custodian has reviewed or will review the merits, legitimacy, appropriateness or suitability of this Investment and I further understand and agree that neither Administrator nor Custodian has evaluated or opined regarding the legality of this Investment under any local, state or federal laws and regulations, including securities laws, regulations promulgated by the Internal Revenue Service or rules and regulations promulgated by the Department of Labor. I agree to indemnify and hold harmless both Administrator and Custodian from any and all claims, damages, liability, actions, costs, expenses (including without limitation, attorneys' fees), and any loss to me or my account as a result of any action taken in connection with this Investment or resulting from their serving as Administrator or Custodian for this Investment, including, without limitation, claims, damages, liability, actions, costs, losses or expenses asserted by me.

I understand and agree that (1) if this Investment Authorization and/or any accompanying documentation are not received as complete and in good order or the directions contained therein are, in the sole opinion of Administrator, unclear, Administrator may not process this investment until proper documentation and/or clarification is received, and (2) if there is insufficient undirected cash in my account to fully comply with my instructions to purchase the Investment and to pay all fees associated with the Investment, Administrator will not process the Investment until I provide sufficient funds to Administrator to do so. In either event, Administrator shall have no liability for any loss of investment, income or appreciation resulting from either of the foregoing situations.

I understand and agree that my account is subject to the provisions of the Internal Revenue Code including, but not limited to Section 4975, which defines certain prohibited transactions. I further understand and agree that neither Administrator nor Custodian has made or will make any determination as to whether this Investment is prohibited under Section 4975 or any other local, state or federal statute or regulation, and that it is my sole responsibility to make such determinations. I hereby warrant and represent that making this Investment will not constitute a prohibited transaction under Section 4975 and that this Investment complies with all applicable laws, regulations and requirements.

I understand and agree that my account may be subject to Unrelated Business Taxable Income (UBTI), and that neither Administrator nor Custodian has made or will make any determination as to whether any asset in my account will generate such income and that it is solely my responsibility to make that determination and, if necessary to file or cause to be filed Form 990-T with the IRS.

I understand that the IRS requires that the assets in my account be valued annually at the end of each calendar year. I agree to provide Administrator with the year-end valuation for each asset in my account no later than February 15th the following year on a form provided by Administrator, along with documentation sufficient to corroborate the values I provide.

I understand that certain types of accounts require minimum distributions ("RMD") to be distributed to the account owner when the account owner reaches a certain age. If I am now subject to the RMD rules or will become subject to them while this account is open, I represent that there will be sufficient liquid assets in this account or in other accounts under Administrator's control to meet my RMD requirement. I understand that my failure to make any required RMD may result in a tax penalty of 50% of the amount I should have distributed.

I understand that all communication with Administrator or Custodian regarding this transaction must be in writing and must be signed by me or, alternatively, signed on my behalf by my authorized agent, and that no oral modification of my instructions will be valid or accepted by Administrator.

By signing below, I hereby acknowledge that I have been advised by Administrator to seek the advice of independent legal, tax and investment counsel prior to executing this Investment Authorization, and that it is incumbent upon me to obtain such advice from qualified third parties prior to initiating this Investment. I further acknowledge that the only responsibility Administrator and Custodian have under this Investment Authorization, or otherwise, is to follow my appropriate written instructions as described in this document. By signing below, I hereby certify that I have completed and thoroughly examined this Purchase Direction of Investment and any accompanying documents or information, to the best of my knowledge and belief, it is all true, correct and complete and I hereby authorize IRA Plan Partners, LLC DBA iPlanGroup to execute the above instructions on behalf of my IRA.

ACCOUNT OWNER/RESPONSIBLE INDIVIDUAL SIGNATURE

Signature

Print Name

Date