

SIGNATURE AUTHORIZATION FORM

Use this form to request that iPlanGroup sign documents on behalf of your Self-Directed account.



1. ACCOUNT & ASSET INFORMATION

Account Owner Name		iPlanGroup Account Number:			
Preferred Daytime Phone Number	Preferred Daytime Email Address	Preferred Daytime Fax Number			
Asset Reference Number (ARN) or Asset Description					

2. DOCUMENTS REQUIRING SIGNATURES

Please list all documents relating to the investment which will require a signature by iPlanGroup.

1.	3.
2.	4.

If necessary, list any additional documents requiring a signature on a separate sheet of paper titled "Signature Authorization Addendum A" and sign/date. Please make sure to attach the addendum to this form when sending to iPlanGroup.

I have attached an Addendum A, signed and dated, listing additional documents. (Optional - Only select this box if applicable)

3. DOCUMENT DELIVERY INSTRUCTIONS

Please indicate below how you would like the above referenced documents to be delivered, once signed.

Send by Mail

Regular Mail Outside UPS Account # _____

Overnight Mail (\$10 Fee + Cost) Outside FedEx Account # _____

Mail to	Attention	Information to be Referenced		
Address	City	State	Zip Code	

Send by Fax Send by Email

Fax Number	Name / Attention	Information to be Referenced
Email Address	Name / Attention	Information to be Referenced

4. PAYMENT OF SIGNATURE/MAILING RELATED FEES

Only complete this section if you have chosen an option above of which will incur a fee. (i.e.: overnight mail)

Please indicate below how you would like to pay for any fees associated with this transaction:

Debit fees from my account Check Enclosed Charge 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: _____

5. ACCOUNT OWNER AUTHORIZATION AND SIGNATURE

I hereby direct iPlanGroup, LLC, (“Administrator”), in its capacity as Agent for Custodian of my Account, to execute the documents named above and I acknowledge the following:

1. The owner of the investment is or will be iPlanGroup, LLC FBO my Account and I authorize and direct Administrator to execute all documents necessary to reflect that my account is the registered owner of the investment or to effect the actions requested in the attached documents necessary to administer the asset on behalf of my Account.
2. I understand that Administrator will only purchase an investment with funds held in my Account and will not advance or loan my Account any funds to effect the purchase of the investment and that all income or other distributions associated with the investment will be paid into my Account and all expenses of or additional contributions to the investment will be paid from my Account and I will not directly accept any payments of income or other distributions nor pay any expenses of or contributions to the investment.
3. I understand and acknowledge that I have the sole responsibility to perform due diligence with respect to the investment and that Administrator does not endorse any investment. Any review performed by Administrator with respect to the investment is solely to determine if purchasing and holding the investment is administratively feasible within the guidelines established by Administrator from time to time.
4. This investment is not insured by the FDIC. I have reviewed and approved the terms of the investment. I acknowledge this investment may involve a substantial risk of loss, may lack liquidity and may result in a total loss of the investment. All risk and loss is borne by my Account.
5. If the investment described above is a private placement investment, I have read the private placement memorandum and all documents provided with respect to the offering. I have met all of the suitability requirements with respect to the investment. I have completed the subscription agreement and any other related required documents and direct Administrator to sign all documents which must be executed to effect the transaction. Administrator may rely on the representations I have made in the subscription agreement and any other related required documents, and I specifically indemnify Administrator and hold it harmless from any damages or losses which arise from my representations in those documents.
6. If the investment described above is an investment in real estate, I have provided the appropriate completed documents and instructions to Administrator and direct Administrator to sign all documents which must be executed to effect the transaction. Administrator may rely on any representations I have made with respect to the purchase of the real property. I understand that all expenses of maintaining the property are to be paid from my Account and any income generated by the property must be deposited into the Account. Administrator is under no obligation to make any payment or collect any income unless directed by me to do so.
7. I acknowledge and represent to Administrator that any investment I direct Administrator to hold in my account which is a “security” under state or federal securities laws has been registered or is exempt from registration. Administrator is relying on representations made by me with respect to the purchase of such investments and I agree to indemnify Administrator and hold it harmless with respect to all costs and expenses arising out of the investment in the security.
8. I understand that Section 4975 of the Internal Revenue Code prohibits certain transactions in individual retirement accounts and that determining whether a prohibited transaction has occurred is based on the facts and circumstances. I also understand that Administrator will not determine whether a transaction is prohibited under Section 4975 of the Internal Revenue Code. I represent to Administrator that I have determined, after consulting with my accountant and/or legal advisor, that the investment to be made under this investment direction is not a prohibited transaction. Should it later be determined that the transaction was prohibited, I understand that my Account will incur a taxable distribution and may be subject to penalties.
9. As provided in the Individual Retirement Account Custodial Agreement and related Disclosure Statement, I understand that it is my responsibility to determine if my Account has generated unrelated business taxable income in any calendar year and that it is also my responsibility to timely provide Administrator with a completed tax form (Form 990-T) and to direct Administrator to sign and file the tax return along with the tax, which amount will be taken from my Account. I understand that if there are insufficient funds in the Account to be able to pay the tax, I must direct Administrator which assets to liquidate to be able to pay the tax and if I do not, Administrator will liquidate sufficient assets to pay the tax. I indemnify and hold Administrator harmless for any failure to prepare and file the tax return and pay the appropriate tax if I fail to timely provide the appropriate form and direction.
10. I understand that Administrator must provide an annual statement of the fair market value of the Account to the IRS and that, with respect to investments whose price is not publicly quoted, I must provide Administrator with a valuation of such investment as of December 31st of each year no later than March 31st of the following year. I also understand that if I do not provide such valuation, Administrator may engage an independent third-party valuation firm to provide such fair market value and the cost of such valuation will be an expense of the Account. I indemnify and hold Administrator harmless for any loss, damage, tax or other consequence to me or the Account arising from or related to the valuation of any assets of the Account.
11. I understand that Administrator’s duties and responsibilities are limited to those specified in this direction form and under the Individual Retirement Account Custodial Agreement and the related Disclosure Statement. Administrator has no liability to me, my beneficiaries or my Account except for breach of the terms of this form, the Custodial Agreement and the Disclosure Statement, as those documents may be in effect from time to time. I indemnify and hold Administrator harmless from any and all claims, damages, liability, actions, costs and expenses (including attorneys’ fees) and responsibility for any loss to my Account, to me or to my beneficiaries or to Administrator which may occur in connection with or by reason of its executing the transaction contemplated by this Investment Direction or by reason of holding the investment in my Account.

By executing this form below I acknowledge that I am solely responsible for directing Administrator to execute the documents listed above on behalf of my Account and that Administrator has no duties or obligations other than following my written direction:

Account Owner Authorization and Signature		
X	Print Name	Date

Responsible Individual Authorization and Signature (For CESA and Minor Accounts Only)		
X	Print Name	Date