

Asset Protection ♦ Tax Deductions ♦ Tax-Free Profits ♦ Estate Planning ♦ Tax-Sheltered Environment

By choosing an IRA with iPlanGroup, you are able to diversify your investment portfolio and invest in what you know while maintaining asset protection in a tax-sheltered environment. If that's not enough to pique your interest, allow us to explain further. Take a look at the information below:

Account Types

iPlanGroup offers the following account options:

- | | | | |
|---|--|---|---|
|  Traditional IRA |  Roth IRA |  Individual 401(k) |  Health Savings Account (HSA) |
|  SIMPLE IRA |  SEP IRA |  Minor Accounts |  Coverdell Education Savings Account (CESA) |

What Sets Us Apart

iPlanGroup was formed *by investors for investors*. We understand the urgency of each investment and we've structured our company in a way that will allow the process to be as smooth, easy and efficient as possible; allowing you to get your funds sent quickly, so you can move on to your next deal.

Here at iPlanGroup, everybody knows your name. No more dealing with call centers, lost paperwork and miscommunication. We come from financial and investment backgrounds, and will give you our full names and

extensions, so you can reach us immediately during time sensitive situations.

Self-Directed Investments

- | | | | |
|---------------|------------|---------------------|-------------------|
| ✓ Real Estate | ✓ Notes | ✓ Tax Liens & Deeds | ✓ Precious Metals |
| ✓ Oil & Gas | ✓ Entities | ✓ Options | ✓ And Many More! |

Networking

- | | | |
|---|---|--|
|  Facebook.com/iPlanGroup |  @iPlanGroup |  LinkedIn.com/company/iplan-group |
|---|---|--|

In addition to our company page on LinkedIn, check out our networking group at:

www.linkedin.com/groups/SelfDirected-IRA-Investors-5022381/about

Contact Us Today to Get Started!

P: 855-604-7526
P: 440-484-5566
F: 440-815-2214

iPlanGroup
28011 Clemens Road
Westlake, Ohio 44145

Accounts@iPlanGroup.com
www.iPlanGroup.com/Strategy

Don't forget to call and schedule your free Strategy Session at 855-604-7526!

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

P: 1-855-604-7526 ■ F: 440-815-2214 ■ www.iplangroup.com ■ Accounts@iPlanGroup.com

TAKE CONTROL INVEST IN WHAT YOU KNOW

Grow Your Money Your Way. You've Earned It.

REAL ESTATE

-  Residential Real Estate
-  Commercial Real Estate
-  Raw Land
-  Real Estate Options
-  Mobile Homes
-  Lease Options
-  Land Contracts
-  Rehabbing
-  Flipping
-  Rental Properties
-  Subject To's
-  Wrap-Around Mortgages
-  Seller-Carrybacks
-  Farm Land
-  Mortgages
-  Deeds of Trust
-  REITS
-  Foreign Real Estate
-  Wholesaling

PRIVATE ENTITIES

-  LLCs
-  C-Corporations
-  Limited Partnerships
-  Land Trusts
-  Joint Ventures
-  REITS
-  Private Placements
-  Foreign Entities
-  Startup Companies
-  Franchises

PROMISSORY NOTES

-  Secured Notes
-  Unsecured Notes
-  Real Estate Notes
-  Student Loans
-  Car Papers

OTHER ALTERNATIVE ASSETS

-  Tax Liens
-  Tax Deeds
-  Oil & Gas Ventures
-  Precious Metals
-  Forex (Foreign Currency)
-  Commodities & Futures
-  Stocks, Bonds, Mutual Funds
-  Judgments/Structured Settlements
-  Equipment Leasing
-  Asset Leasing
-  Options
-  Factoring
-  Partnering
-  Livestock
-  Vehicles
-  Storage Leasing
-  Crypto Currency
-  And Many More!

Scan the QR Code to schedule your *FREE IRA Strategy Session!*



A Self-Directed IRA Helps You Take Control of Your Financial Future.

Toll Free: (855) 604-7526 ♦ www.iPlanGroup.com/Strategy ♦ Accounts@iPlanGroup.com

2024 Retirement Plan Comparison

Questions? Contact an iPlanGroup Representative at (855) 604-7526.

	TRADITIONAL IRA	ROTH IRA	SEP IRA	SIMPLE IRA	INDIVIDUAL 401(K)	COVERDELL EDUCATION SAVINGS ACCOUNT (CESA)	Health Savings Account (HSA)
Description & Eligibility	At any age and have earned income	Must have earned income, and fall within the MAGI limitations: <i>Single:</i> \$146k to \$161k <i>Married Filing Jointly:</i> \$230 to \$240k <i>Married Filing Separate:</i> \$0 to \$10k	Simplified Employee Pension - For small businesses. Employer-only contributions for each eligible employee. Must be 21 years of age, have worked for the business for 3 of the last 5 years, and have earned at least \$600 in compensation.	Savings Incentive Match Plan for Employees - For small businesses with 100 or fewer employees who have earned \$5,000 or more in compensation for the preceding year and have no other qualified plans.	For owner-only businesses and their spouses who have earned income. The account owner may also elect to add a Roth Component in order to make tax-free employee contributions.	May be established for an individual under the age of 18, or a special needs person. If the contributing party has earned income, they must fall within the MAGI Limitations: <i>Married Filing Separately/ Single:</i> \$0-110k <i>Married Filing Jointly:</i> \$0-220k	Health Savings Account For Individuals and their families that are enrolled in a High Deductible Health Plan and typically do not have additional health coverage. Deductible and out-of-pocket expenses apply. No Earned income needed.
Tax Considerations	*Taxes paid at the time of withdrawal *Contributions may be tax-deductible (within AGI limits)	Contributions & earnings are tax-free upon withdrawal after withdrawal rules have been met	*Taxes paid at the time of withdrawal *Contributions are tax-deductible to the employer only	*Taxes paid at the time of withdrawal *Contributions made by employer and employee	*Taxes paid either at contribution or at withdrawal *Contributions are tax-deductible	Distributions are tax-free if used for qualified educational expenses	*Distributions tax-free if used for qualified medical expenses *Employee Contributions are tax-deductible
Maximum Age to Contribute	70 1/2 Unless Still Working	None	None	None	None	18 unless beneficiary is special needs	None (unless enrolled in Medicare)
Annual Contribution Limits	\$7,000 (Under age 50) \$8,000 (Age 50+)	\$7,000 (Under age 50) \$8,000 (Age 50+)	0-25% of the employee's compensation, up to \$69k (whichever is less)	Employee - \$16,000 or \$19,500 (age 50+) Employer - Match up to 3% or contribute 2%	Employee - \$23,000 or \$30,500 (age 50+) Employer-46k Total:\$69k (\$76.5 k age 50+)	\$2,000	Individual - \$4,150 or (over age 55) \$5,150 Family - \$8,300 or (over age 55) \$9,300
Annual Contribution Deadline	Tax filing deadline of following year	Tax filing deadline of following year	Due date of employer's federal tax return for the year (plus extensions)	Employers - tax filing deadline (plus extensions) Employees - varies	Varies	Tax filing deadline of following year	Tax filing deadline of following year
Withdrawal Rules (For Distributions)	Must have reached the age of 59 ½ to take a distribution of contributions and earnings	Must have reached the age of 59 ½ and 5 years from the first taxable year a contribution was made to take a distribution of earnings	Must have reached the age of 59 ½ to take a distribution of contributions and earnings	Must have reached the age of 59 ½ to take a distribution of contributions and earnings	Must have reached the age of 59 ½ and follow the plan rules.	Anytime for qualified expenses or within 30 days of beneficiary turning 30 years old (unless special needs)	Funds may be taken at any time, as long as they are used for qualified medical expenses.
Premature Withdrawal Penalties	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	20% additional tax on the distribution amount unless you reach age 65, become disabled or pass away
Annual RMD (Required Minimum Distributions)	As of 01/01/2024 the RMD age is 73. (Some exclusions apply)	There is no RMD for this plan type	As of 01/01/2024 the RMD age is 73. (Some exclusions apply)	As of 01/01/2024 the RMD age is 73. (Some exclusions apply)	As of 01/01/2024 the RMD age is 73. (Some exclusions apply)	Funds must be withdrawn or rolled over within 30 days of the beneficiary reaching the age of 30 (unless special needs)	There is no RMD for this plan type

2023 Retirement Plan Comparison

Questions? Contact an iPlanGroup Representative at (855) 604-7526.

	TRADITIONAL IRA	ROTH IRA	SEP IRA	SIMPLE IRA	INDIVIDUAL 401(K)	COVERDELL EDUCATION SAVINGS ACCOUNT (CESA)	Health Savings Account (HSA)
Description & Eligibility	At any age and have earned income	Must have earned income, and fall within the MAGI limitations: <i>Single:</i> \$138k to \$153k <i>Married Filing Jointly:</i> \$218 to \$228k <i>Married Filing Separate:</i> \$0 to \$10k	Simplified Employee Pension - For small businesses. Employer-only contributions for each eligible employee. Must be 21 years of age, have worked for the business for 3 of the last 5 years, and have earned at least \$600 in compensation.	Savings Incentive Match Plan for Employees - For small businesses with 100 or fewer employees who have earned \$5,000 or more in compensation for the preceding year and have no other qualified plans.	For owner-only businesses and their spouses who have earned income. The account owner may also elect to add a Roth Component in order to make tax-free employee contributions.	May be established for an individual under the age of 18, or a special needs person. If the contributing party has earned income, they must fall within the MAGI Limitations: <i>Married Filing Separately/ Single:</i> \$0-110k <i>Married Filing Jointly:</i> \$0-220k	Health Savings Account For Individuals and their families that are enrolled in a High Deductible Health Plan and typically do not have additional health coverage. Deductible and out-of-pocket expenses apply. No Earned income needed.
Tax Considerations	*Taxes paid at the time of withdrawal *Contributions may be tax-deductible (within AGI limits)	Contributions & earnings are tax-free upon withdrawal after withdrawal rules have been met	*Taxes paid at the time of withdrawal *Contributions are tax-deductible to the employer only	*Taxes paid at the time of withdrawal *Contributions made by employer and employee	*Taxes paid either at contribution or at withdrawal *Contributions are tax-deductible	Distributions are tax-free if used for qualified educational expenses	*Distributions tax-free if used for qualified medical expenses *Employee Contributions are tax-deductible
Maximum Age to Contribute	70 1/2 Unless Still Working	None	None	None	None	18 unless beneficiary is special needs	None (unless enrolled in Medicare)
Annual Contribution Limits	\$6,500 (Under age 50) \$7,500 (Age 50+)	\$6,500 (Under age 50) \$7,500 (Age 50+)	0-25% of the employee's compensation, up to \$66k (whichever is less)	Employee - \$15,500 or \$19,000 (age 50+) Employer - Match up to 3% or contribute 2%	Employee - \$22,500 or \$30,000 (age 50+) Employer-43.5k Total:\$66k (\$73.5 k age 50+)	\$2,000	Individual - \$3,850 or (over age 55) \$4,850 Family - \$7,750 or (over age 55) \$8,750
Annual Contribution Deadline	Tax filing deadline of following year	Tax filing deadline of following year	Due date of employer's federal tax return for the year (plus extensions)	Employers - tax filing deadline (plus extensions) Employees - varies	Varies	Tax filing deadline of following year	Tax filing deadline of following year
Withdrawal Rules (For Distributions)	Must have reached the age of 59 ½ to take a distribution of contributions and earnings	Must have reached the age of 59 ½ and 5 years from the first taxable year a contribution was made to take a distribution of earnings	Must have reached the age of 59 ½ to take a distribution of contributions and earnings	Must have reached the age of 59 ½ to take a distribution of contributions and earnings	Must have reached the age of 59 ½ and follow the plan rules.	Anytime for qualified expenses or within 30 days of beneficiary turning 30 years old (unless special needs)	Funds may be taken at any time, as long as they are used for qualified medical expenses.
Premature Withdrawal Penalties	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	10% additional tax on distribution amount (unless it qualifies for an exception)	20% additional tax on the distribution amount unless you reach age 65, become disabled or pass away
Annual RMD (Required Minimum Distributions)	As of 01/01/2023 the RMD age is 72. (Some exclusions apply)	There is no RMD for this plan type	As of 01/01/2023 the RMD age is 72. (Some exclusions apply)	As of 01/01/2023 the RMD age is 72. (Some exclusions apply)	As of 01/01/2023 the RMD age is 72. (Some exclusions apply)	Funds must be withdrawn or rolled over within 30 days of the beneficiary reaching the age of 30 (unless special needs)	There is no RMD for this plan type

FEE SCHEDULE

TRADITIONAL / ROTH / SEP / SIMPLE / CESA / HSA / 401(k)

Questions? Our representatives are available to assist you at 855-604-7526.

ACCOUNT ESTABLISHMENT FEES¹

(One-time fee charged at time of account opening)

Health Savings Account (HSA), or COVERDELL Educational Savings Account (CESA)	\$25
Traditional, Roth, SEP, or SIMPLE, 401(k)	\$50

INITIAL & ANNUAL ADMINISTRATION FEES

The initial Administration Fee is assessed based on your estimated portfolio value (cash and assets), and due at the time of the account establishment²; Annual Administration Fees are due on the anniversary of the establishment date thereafter.³

TRADITIONAL, ROTH, SEP, SIMPLE, CESA, HSA or 401(k)		(UNLIMITED ACCOUNT INVESTMENTS ⁴)	
Account Value	Administration Fee	Account Value	Administration Fee
\$0- \$9,999	\$250	\$500,000 - \$599,999	\$800
\$10,000 - \$49,999	\$300	\$600,000 - \$699,999	\$900
\$50,000 - \$99,999	\$400	\$700,000 - \$799,999	\$1000
\$100,000 - \$199,999	\$500	\$800,000 - \$899,999	\$1,100
\$200,000 - \$299,999	\$600	\$900,000 - \$999,999	\$1,200
\$300,000 - \$399,999	\$650	\$1,000,000 - \$1,999,999	\$1,500
\$400,000 - \$499,999	\$700	\$2,000,000 & UP	\$2,000

TRANSACTION AND OTHER SERVICE RELATED FEES

Purchase, sale, or exchange of alternative investment asset	NO FEE	Wire Transfers - (Domestic) Incoming / Outgoing	\$35
Expense Payments (Bill Pay)	NO FEE	Wire Transfers - (International) Incoming / Outgoing	\$75
Transaction Review / Document Signing	NO FEE	Incoming / Outgoing ACH	\$5
Reprocessing of Incomplete Documents	NO FEE	Cashier's Check	\$30
Signature Notarization (Notary Fee)	NO FEE	Stop Payment	\$35
Roth Conversion / Recharacterization	NO FEE	Returned Checks / Declined Credit Cards	\$35
Corrected Form 1099-R or Form 5498	NO FEE	Partial Cash Transfer Out	\$75
Distributions	NO FEE	Asset Transfer Out (per asset)	\$100
EIN Creation	\$10	Account Termination	\$250
Real Estate Fair Market Valuation Fee	\$50	Account Reinstatement	\$150
Matured Note Fee	\$50 / Month	FMV Forced Distribution	\$100
Quarterly Statements by Mail	\$10 / Quarter	Re-Contribution of an Asset	\$150
Mail Forwarding	\$5 / Item	Research of Terminated Accounts	\$150 / hr
		Blue Diamond Precious Metal LLC	\$200
Overnight, Servicer, Certified, and / or Priority Mail	\$20 Processing Fee + cost		
Late Payment	\$50 / 30 Days Past Due (Max \$100 / 60 Days		
Credit Card Processing	5% of Total Amount Charged to Card		
Legal Notice Fee	\$150 / hr + \$0.10 / Page		

¹If establishing a Traditional IRA as a "Pass-through" account, due to the intent of immediate Roth Conversion, a \$50 Account Establishment Fee will be assessed on the Traditional "Pass-through" Account regardless of whether or not the Traditional IRA is maintained post-conversion. / ²With the exception of different terms agreed upon by IRA Plan Partners, LLC DBA iPlanGroup as Administrator / ³IRA Plan Partners, LLC reserves the right to increase your initial Administration Fee to the appropriate tier if, within 60 days subsequent to the date in which said fee was paid, your account value exceeds the estimated fee level assessed, due to an Account Transfer, Rollover, Conversion or Recharacterization. In the event of an increase as aforementioned, IRA Plan Partners, LLC additionally reserves the right to obtain the excess amount owed, sufficient to the Fee Payment Option as chosen via your New Account Application. / ⁴Includes all asset types / ⁵Commingled storage fee will be billed at the rate of \$1 per \$1000. Segregated storage (only gold, platinum, and palladium) will be billed at the rate of \$1.60 per \$1000 of the asset value at DDSC. See other fees for shipping fee. / ⁶If fees remain outstanding past 60 days, IRA Plan Partners, LLC reserves the right to distribute the asset and/or force close the account without prior notice to the account owner. In the event of aforementioned force closure, IRA Plan Partners, LLC DBA iPlanGroup reserves the right to assess and deduct or charge the account an Account Termination Fee. / ⁷This fee is assessed in the event that iPlanGroup must search the applicable county website to determine the assessed value of real estate. / ⁸Assessed in the event that IRA Plan Partners LLC is subpoenaed to provide documentation regarding your account.

Custodian's Fees: I agree that Mainstar Trust ("Mainstar"), Custodian, will receive, from the assets held in my account, a fee equal in amount to all income that is generated from any Undirected Cash (defined as any cash in my account not invested pursuant to a specific investment directed by me) which is held by Mainstar in an account or product of any FDIC or other United States Government insured financial institutions, United States government securities, or securities that are insured or guaranteed by the United States government. I agree that this fee may be retained by Mainstar as compensation for the services provided by Mainstar in relation to my account. Mainstar may pay all or an agreed portion of this fee to IRA Plan Partners, LLC dba iPlanGroup, Administrator, as agreed between Mainstar and IRA Plan Partners, LLC dba iPlanGroup. Mainstar reserves the right to change all or part of the Custodial Fee Schedule at its discretion with a 30 days advance notice. I acknowledge and agree that Mainstar may hold any undirected cash in my account in any FDIC insured financial institution or in United States government securities or in securities that are insured or guaranteed by the United States government without any further approval or direction by me.

Transfer, Rollover & Conversion Chart

This chart indicates the eligible types of money/asset movements between different retirement accounts.
Questions? Contact an iPlanGroup Representative at (855) 604-7526.

Into Account Type		TRADITIONAL IRA	ROTH IRA	SEP IRA	SIMPLE IRA	INDIVIDUAL 401(k)	CESA	HSA
From Account Type	Eligible Account Movements							
	TRADITIONAL IRA	Transfer or Distribution Rollover	Conversion	Transfer or Distribution Rollover	Transfer or Rollover after two years	Transfer or Distribution Rollover	Not Eligible	Transfer (one-time only)
	ROTH IRA	Not Eligible	Transfer or Distribution Rollover	Not Eligible	Not Eligible	Not Eligible	Not Eligible	Transfer (one-time only)
	SEP IRA	Transfer or Distribution Rollover	Conversion	Transfer or Distribution Rollover	Transfer or Rollover after two years	Transfer or Distribution Rollover	Not Eligible	Not Eligible
	SIMPLE IRA	Transfer or Rollover after two years	Conversion after two years	Transfer or Rollover after two years	Transfer or Distribution Rollover	Transfer or Rollover after two years	Not Eligible	Not Eligible
	CESA	Not Eligible	Not Eligible	Not Eligible	Not Eligible	Not Eligible	Transfer or Rollover	Not Eligible
	HSA	Not Eligible	Not Eligible	Not Eligible	Not Eligible	Not Eligible	Not Eligible	Transfer or Rollover
	INDIVIDUAL 401(k) (pre-tax/tax-deferred)	Distribution Rollover or Direct Rollover	Conversion	Distribution Rollover or Direct Rollover	Transfer or Rollover after two years	Distribution Rollover or Direct Rollover	Not Eligible	Not Eligible
	457(b)	Distribution Rollover or Direct Rollover	Conversion	Distribution Rollover or Direct Rollover	Transfer or Rollover after two years	Distribution Rollover or Direct Rollover	Not Eligible	Not Eligible
	QUALIFIED PLAN (pre-tax/tax-deferred)	Distribution Rollover or Direct Rollover	Conversion	Distribution Rollover or Direct Rollover	Transfer or Rollover after two years	Distribution Rollover or Direct Rollover	Not Eligible	Not Eligible
	403(b) PLAN (pre-tax/tax-deferred)	Distribution Rollover or Direct Rollover	Conversion	Distribution Rollover or Direct Rollover	Transfer or Rollover after two years	Distribution Rollover or Direct Rollover	Not Eligible	Not Eligible
	DESIGNATED ROTH ACCOUNT 401(k), 403(b) or 457(b)	Not Eligible	Conversion	Not Eligible	Not Eligible	Conversion to a Designated Roth Individual 401(k)	Not Eligible	Not Eligible

Transfer, Rollover & Conversions Explained

Questions? Contact an iPlanGroup Representative at (855) 604-7526.

Definitions

TRANSFER

The movement of IRA funds or assets directly from one IRA to another IRA without the account owner taking receipt of funds. This is sometimes referred to as a Trustee to Trustee Transfer. A Transfer is not a tax-reportable event.

DISTRIBUTION ROLLOVER

A Distribution Rollover occurs when you withdraw cash or assets in the form of a personal distribution from one retirement account and contribute all or part of it to another eligible plan/account within 60 days of receipt of the funds and/or assets. You can make only one personal distribution rollover from an IRA to another (or the same) IRA in any 12-month period, regardless of the number of IRAs you have. The limit will apply by aggregating all of an individual's IRAs, including SEP and SIMPLE IRAs as well as traditional and Roth IRAs, effectively treating them as one IRA for purposes of the limit.

DIRECT ROLLOVER

The transfer of funds directly from a qualified retirement plan into an IRA or retirement plan without the account owner taking receipt of the funds. This rollover transaction is not taxable, but it is reportable on your federal tax return. Both a 1099 and 5498 are typically created, by your account custodian or administrator, to report the transaction.

ROTH CONVERSION

Also known as a "Conversion Contribution," a Roth Conversion is the movement of funds from a tax-deferred IRA or retirement plan into a tax-free Roth IRA or designated Roth qualified plan. This is a taxable event, and both a 1099 and 5498 are typically created, by your account custodian or administrator, to report the transaction.

RECHARACTERIZATION

Typically, a Recharacterization is the action of reversing a Roth Conversion by moving the funds or assets back into a traditional IRA. You may also be able to treat a contribution made to one type of IRA as having been made to a different type of IRA, which is referred to as recharacterizing the contribution. A Recharacterization is typically done via a trustee-to-trustee transfer, and if made by the due date (including extensions) for your tax return for the year during which the contribution was made, you can elect to treat the contribution as having been originally made to the second IRA instead of the first IRA in which the funds or assets were deposited. Typically, both a 1099 and 5498 will be created, by your account custodian or administrator, to report the transaction.

Tax-Reporting for Rollovers, Conversions & Recharacterizations

Q. When will I receive a 1099 and 5498 to report my Rollover, Roth Conversion or Recharacterization?

A. You should receive the 1099 from the custodian or administrator of which the funds were distributed, prior to your tax filing deadline. The 5498 is typically mailed to you after the tax-filing deadline, by the receiving custodian or administrator, due to the fact that 5498s are also used to report prior year contributions which can be made up to the tax filing deadline.

How to Initiate the Transaction

Follow the instructions below in order to request a money or asset movement from another IRA company into your iPlanGroup Account. Questions? Contact an iPlanGroup Representative at (855) 604-7526.

TRANSFER

In order to initiate a Transfer, you will need to contact your current IRA administrator/custodian and obtain the following information to provide to iPlanGroup:

1. Your Account Type, Account Number, and “Transfer Out” processing timeframe
2. A copy of your most recent statement, reflecting if your funds/assets are invested or liquid (if you plan to liquidate assets, it may be in your best interest to request the liquidation prior to sending the Transfer Form to iPlanGroup, in order to avoid a delay of the transfer)
3. Whether or not your current custodian requires the original Transfer Form via mail, and if so, you will need to obtain the mailing address. If they will accept a copy, please obtain the fax number or email address and to whose attention the paperwork should be addressed.

Once you have this information, please complete and provide the following documents to iPlanGroup:

-  iPlanGroup Account Transfer Request Form
-  A copy of your most recent statement from your current IRA administrator/custodian

SUBMISSION OPTIONS

FAX

440-815-2214

EMAIL

NewAccounts@iPlanGroup.com

MAIL*

iPlanGroup
28011 Clemens Road, Ste B
Westlake, Ohio 44145

*Use this option if your current Administrator/Custodian requires that the original form be sent via mail.

Once iPlanGroup receives the Account Transfer Request Form, we will review it and send it to your current Administrator/Custodian as requested on the form. This is typically done within 1-2 business days upon receipt of the form.

How to Initiate the Transaction (continued)

Follow the instructions below in order to request a money or asset movement from another IRA company into your iPlanGroup Account. Questions? Contact an iPlanGroup Representative at (855) 604-7526.



DISTRIBUTION ROLLOVER

In order to initiate a Distribution Rollover, you will need to contact your current IRA Administrator/Custodian and follow their instructions for requesting a Distribution. Typically this consists of completing a Distribution Form. Once you receive the check or assets in the mail, follow the instructions below:

CASH DISTRIBUTION

Endorse the back of the check, and on the back or in the memo section, please write “Make payable to iPlanGroup FBO *YOUR NAME* IRA.” You will then need to mail this check to iPlanGroup (follow the instructions below) along with our IRA Contribution Form, indicating a rollover in Section 2. If you are initially funding your new account with a rollover, you do not need to send us a *Contribution/Rollover Deposit Slip* as long as your application indicates that you are funding the account via a rollover.

ASSET DISTRIBUTION

Submit the asset documents to iPlanGroup (follow the instructions below) along with our IRA Contribution Form, indicating in Section 2 that it is a rollover. If you are initially funding your new account with a rollover, you do not need to send us a Contribution/Rollover Deposit Slip as long as your application indicates that you are funding the account via a rollover. It is also in your best interest to contact an iPlanGroup representative to discuss the process for re-registering the asset in the name of your iPlanGroup account.

DIRECT ROLLOVER

In order to initiate a Direct Rollover, you will need to contact your current IRA Administrator/Custodian and follow their instructions for requesting a Direct Rollover. You may instruct them to mail the documents to iPlanGroup using the submission options below. It is also in your best interest to contact an iPlanGroup representative to discuss the process for re-registering the asset in the name of your iPlanGroup account. If your current IRA Administrator/Custodian requests that iPlanGroup initiate the Direct Rollover Request, please complete our Direct Rollover Form and submit it to iPlanGroup using the instructions below. Once received, we will review it and forward to your current Administrator/Custodian in order to request the rollover.

ROTH CONVERSION

In order to initiate a Roth Conversion, please complete our Roth Conversion Form and submit to iPlanGroup using the Submission Options below.

SUBMISSION OPTIONS

MAIL*

iPlanGroup
28011 Clemens Road, Suite B
Westlake, Ohio 44145

EMAIL

NewAccounts@iPlanGroup.com

FAX

440-815-2214

*Use this option if your current Administrator/Custodian requires that the original form be sent via mail.