



IRA APPLICATION

Please return to: 10300 SW Greenburg Rd., Suite 465
Portland, OR 97223
503.619.0223 Fax: 503.206.7641
admin@iraadvantage.net

Applicant Information:

First Name	MI	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Street Address		
<input type="text"/>		
City, State, Zip Code	County	
<input type="text"/>	<input type="text"/>	
Email Address		
<input type="text"/>		
Occupation & Industry/Source of Wealth		
<input type="text"/>		

**Please include photo ID
(Front and Back) when
returning application.**

Phone
<input type="text"/>
Social Security #
WE WILL CALL
Date of Birth (mm/dd/yyyy)
<input type="text"/>
Married?
Y <input type="checkbox"/> N <input type="checkbox"/>
Country of Citizenship
<input type="text"/>

Type & Number of Accounts:

Current account(s) you will be transferring & types (Traditional, Roth, SEP, SIMPLE, 401k, 403b) and the custodian(s)

<input type="text"/>
<input type="text"/>

Beneficiary Designation (Percentages should total 100%):

1. Full Name	Percentage
<input type="text"/>	<input type="text"/>
Social Security #	Relationship
WE WILL CALL	<input type="text"/>
Date of Birth (mm/dd/yyyy)	Percentage
<input type="text"/>	<input type="text"/>
2. Full Name	Relationship
<input type="text"/>	<input type="text"/>
Social Security #	Relationship
WE WILL CALL	<input type="text"/>
Date of Birth (mm/dd/yyyy)	
<input type="text"/>	

Spousal Consent

Spousal signature required if the Primary Beneficiary is other than the spouse and the Depositor is subject to laws of a community property state. I consent to the above Beneficiary Designation:



Spouse signature

Date

Name Choice for your IRA LLC:

State: _____

First Choice:

Second Choice:

Business Purpose of LLC:

- ☐ Real Estate & Real Estate Related Assets
- ☐ Lending (startups, existing businesses, etc.)
- ☐ Securities, stocks, bonds, mutual funds, etc.
- ☐ Precious Metals
- ☐ Other: _____

Funding:

How will you be funding this account? Check each box that applies and write in your estimated dollar amount. Note: Custodians typically require a balance of \$300-\$500 remain "uninvested" in the Cash Reserve portion of your IRA at all times. Make sure to consider this minimum cash balance requirement, as well as any fees that may occur, when funding your account.

Transferring/Rolling over qualified funds:

- ☐ Transfer(s) from other IRA(s).....\$ _____
- ☐ Direct Rollover from employer-maintained plan..\$ _____
(i.e., 401k, 403b, Profit Sharing Plan)

Self Directed IRA Custodian You Are Choosing: _____

Please note: If you are transferring IRA funds, please include a copy of our most recent IRA statement. All funds must be turned to cash otherwise they will not be transferred.

How did you hear about us?

Signature:

Date:
