

Self-directed IRAs require assistance from the IRA owner prior to purchasing an asset. We have outlined the steps needed below to help you in setting up your precious metals purchase.

Before you start the purchase you must decide how you will store the gold when purchased. Please talk to AdvantaIRA about storage before you make your purchase. You are not allowed to store your own IRA precious metals.

Some Depository Options include: First State Depository Company, LLC, Delaware Depository, Local Gold Dealers or a safety deposit box.

Documents required prior to purchasing asset

The following items must be received at least 48 hours prior to funding:

1. Precious Metals Buy Direction Letter-showing what the IRA is purchasing
2. Invoice/Buy Order from precious metals dealer. This form should show the IRA as the investor
3. Wire Instructions for the precious metals dealer
4. Signed depository agreement for the precious metals depository
5. Client approval of above items 2-4. Must be signed by the client as 'read and approved'

Title Instructions for Dealer or Depository

Investor Name: AdvantaIRA, LLC FBO IRA# _____

1520 Royal Palm Sq. Blvd. #320, Fort Myers, FL 33919

Tax ID#: 27-2705515

239-333-1031 Phone

AdvantaIRA Precious Metal Fees (paid from your IRA account unless other arrangements are made):

Account set up: \$50

Asset Acquisition: \$35

Wire Transfer Fee: \$25

Annual Fee: \$100

*Note: The fee for the storage company must be paid with IRA funds

*AdvantaIRA Trust, LLC does not endorse any precious metals storage facility/company

Call us today at 239-333-1031 or visit on the web at www.AdvantaTrust.com