Private Entity Investment

Enclosed are the forms required to complete an investment into a private entity with American IRA, LLC.

Upon receipt of all documents, in good order, funding will be sent within three (3) business days.

Step 1:

Funding Package: *Submit documents listed in Step 1 as one complete packet*

- **American IRA Forms**
  - **Private Entity Investment Form:** Submit Private Entity Investment Form and supporting documents from company
  - **Entity Investment Compliance Notification:** Submit Notification signed by both you and an authorized signor for the company your investing into
- **To be prepared by company prior to funding:** with proper titling [New Vision Trust Custodian FBO (your name)(your account type)] and initialed by you as "Read and Approved" **DO NOT SIGN DOCUMENTS AS subscriber/purchaser/member**
  - Operating/Partnership Agreement, including membership schedule indicating IRA/401k membership

    OR
  - Completed Subscription Agreement, if applicable

Step 2:

Once you are ready to submit a package:

By Email: AllForms@AmericanIRA.com

By Fax: (828) 257-4948

By Mail: American IRA, LLC -135 Broad Street, Asheville NC 28801

Overnight: American IRA, LLC -135 Broad Street, Asheville NC 28801

Please Ensure:

- Subscriber/Purchaser Name: New Vision Trust Custodian FBO (your name)(your account type)
- Subscriber/Purchaser Address: Your mailing address
- All documents are initialed on every page as Read and approved or they cannot be processed
- All documents will be signed by a New Vision Trust Company and/or authorized signer

Need Help? Call 1-866-7500-IRA(472) and a client services representative will assist you today!

American IRA, LLC
Processing Office-135 Broad Street |Asheville, NC 28801 |(828) 257-4949
AmericanIRA.com

New Vision Trust Company
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Sioux Falls, SD 57103