

Land Trust Investment

Enclosed are the forms required to complete an investment into a Land Trust 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 Private Entity Investment Form:** Submit Private Entity Investment Form and supporting documents from Trustee
- **To be prepared by Trustee 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 AS beneficiary
 - Land Trust Agreement showing your IRA/401k as the beneficiary

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:

- Beneficiary Name: New Vision Trust Custodian FBO (your name)(your account type)
- Beneficiary 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!**