

IRA
CLUB

Sponsor Guide



About Us

- 16 years of industry experience
- \$1 Billion under administration
- Live IRA specialists, not a call center
- Full service IRA administrator
- Flat fees and straightforward pricing
- FDIC insured
- Simple and streamlined process
- Strong, secured monitoring systems

THE IRA CLUB ADVANTAGE

- Phone and email support available Monday-Friday 9:00 AM–5:00 PM CT
- Annual IRA tax reporting for your investors
- [Investor's Row](#) opportunities to showcase your company and offering
- Webinar and live event opportunities
- Custom landing page for fast, streamlined processing
- Sponsor portal for up-to-date client status
- Trading platform powered by [iFlip](#)



Self-Directed **Benefits**

There are more options besides stocks, bonds, and mutual funds! Unlike classic brokerage firms, IRA Club allows your clients to select alternative investments best suited for their future. Doing so gives them back control, flexibility, and the opportunity for much higher returns without creating artificial restrictions on IRAs and Solo 401k(s).

IRA Club vs Classic Brokerage Firm

IRA CLUB

Allows any investment that is permitted by the IRS

Client is in complete control

Straightforward, flat fees

No kickbacks

Cash flow, greater returns, growth

CLASSIC BROKERAGE FIRM

Limited to stocks, bonds, and mutual bonds

Financial advisor is in control

Percentage-based fees

Hidden kickbacks

Volatility



Raise Money for Your Next Investment

Self-Directed IRA Administrator

There are **40 trillion dollars** of retirement funds in the U.S. waiting to invest in your next deal! IRA Club has been a trusted Self-Directed Administrator for hundreds of investment providers. For the past 16 years, our clients have invested their IRAs into Private Placements, Syndications, Single Family Homes, Vacant Land, Precious Metals, Tech Startups, Oil and Gas, and Life Settlements.



FAST SERVICE

- Live IRA specialists
- Not a call center
- Fast and friendly staff



CUSTOMIZATION

- Landing pages
- Webinars and events
- Investor's Row access



FLAT FEES

- No percentages
- No commissions
- No kickbacks

Types of Accounts

* TRADITIONAL IRA

* ROTH IRA

* SEP IRA

* SIMPLE IRA

* INHERITED ROTH IRA AND INHERITED TRADITIONAL IRA

* YOUTH IRA

* HSA

* SOLO 401(k)

* SMALL BUSINESS PLANS



The Process



OPEN

The client establishes a Self-Directed account.



FUND

Our Transfer Team is here to assist in any way they can with a transfer, rollover, or contribution.

Various Ways to Fund the Account

- IRA to IRA transfer
- Old employer rollover (401(k), 403(b), 457, TSP)
- Contribution

IRA to IRA Transfer (funds move from one institution to IRA Club)

Please note that each custodian has different transfer requirements. Fidelity is not the same as Edward Jones.

- Some firm requirements that vary:
 - Fax, email, or mail as delivery methods
 - Originals, wet signatures, or e-signatures from the client
 - Medallion stamps may be required for the client to obtain at their local bank

The IRA Club Transfer Team will initiate the transfer request once we receive a copy of the statement and a completed IRA to IRA Transfer Request Form.

After IRA Club initiates the transfer, the surrendering firm's processing time can take a few days, up to 3 weeks for funds to arrive to IRA Club.

Employer Rollover

- The client initiates the rollover. This process usually takes 2-4 weeks, but it is quicker if processed as an ACAT.

Contribution

- Client or spouse (if filling jointly) must have earned income
- Annual limits set by the IRS



INVEST

The client identifies the investment, performs due diligence, and benefits from the tax-sheltered or tax-free growth.

Process and Fees

IRA Club Process and Fees Explained

STEP 1:

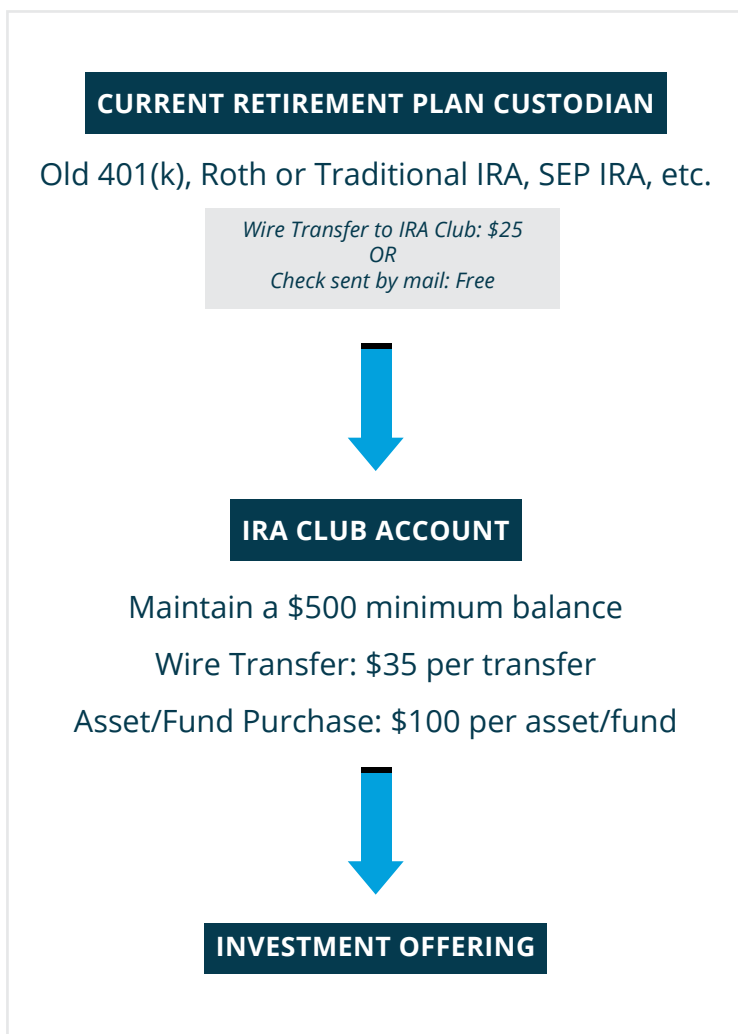
Open account with IRA Club. Client's first year's annual membership fee (\$195) is waived when using your company's promo code. (1 business day)

STEP 2:

Client will transfer funds from their current retirement plan custodian to your IRA Club account. (IRAs average time 5-10 business days/401(k)s average time 14-21 business days)

STEP 3:

Transfer funds from the IRA Club account to the investment provider while maintaining at least \$500 in the IRA Club account. (3-5 business days once all the documents have been received)



ONE-TIME BANK FEES

- Wire Transfers: \$25 into the IRA Club account. \$35 out of the IRA Club account
- Buy/Sell/Transfer of an asset: \$100 per asset/fund

ANNUAL FEES

- IRA Club Membership: \$195 (first year waived when using promo code)
- Asset Holding (Self-Directed IRA Holding): \$195 per asset/fund

Sponsor Testimonials



“IRA Club has unlocked millions in capital and changed the way we help our clients invest.”

— **AARON ADAMS,**
Alpine Capital Solutions



“IRA Club educates what XWealth Strategies preaches. Diversifying one’s portfolio.”

— **CHARLES DOMBEK,**
XWealth Strategies



“I have used a few different self-directed custodians. Working with the IRA club has been a great experience. They are professional, competent, and responsive. I have appreciated the communication and help with their platform. I highly recommend them for investors looking to do self-directed retirement accounts!!”

— **NATE GOAD,**
Alden Investment Group

We look forward to working with you!

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REMINDER

IRA Club offers no investments, products, or planning services. Therefore, please consult your attorney, tax professional, financial planner, and any other qualified person before making any investments. Be advised that IRA Club does not evaluate, review, monitor, recommend, warrant, guarantee, or otherwise endorse the legality, tax treatment, propriety, performance, or reliability of any investment, service, statement, opinion, or other representation provided with respect to the investment opportunities listed on its site or their sponsors or providers. IRA Club has no financial arrangement, partnership, joint venture, or other affiliation with the sponsors or providers of these investments. IRA Club shall not be liable for any misinformation, misrepresentation, negligence, act, omission, investment results, or any wrongdoing with respect to any of these investments or their sponsors or providers.