



Real Control. Real Choice. Real Wealth.

Documents Required Prior to Private Placement Funding

RealTrust IRA Alternatives, LLC ("*RealTrust*") requires the following documents *prior* to funding Private Placement investments. As the subject asset is to be held in a Retirement Account, the instructions set forth below must be followed to ensure compliance with both I.R.S. requirements and *RealTrust* policies.

- (1) **Account Holder to complete/sign/return the *RealTrust* Asset Purchase Directive.**
- (2) **Account Holder to review, sign and return the following to *RealTrust*:**
 - **Private Placement Instructions**
 - **Subscription Agreement (with correct vesting as shown in the Private Placement Instructions)**

- (3) **Manner of Vesting for IRA's (ensure signature blocks appear as follows):**

"RealTrust IRA Alternatives, LLC FBO Jane Doe (IRA Holder) IRA #20XXX

By: _____
_____, its Authorized Signatory

ACCEPTED AND APPROVED:

_____, IRA Holder

- (4) **Account Holder to send *RealTrust* a copy of (as applicable):**
 - **LLC: Operating Agreement & Subscription Agreement**
 - **LP: Partnership Agreement & Subscription Agreement**
 - **Corporation: Articles of Incorporation, By Laws & Subscription Agreement**
 - **Private Placement Offering Memorandum**
 - **Other: _____**
- (5) **Account Holder must sign "Read and Approved" on all documents PRIOR to *RealTrust* executing the pertinent document(s) and funding the investment.**

Note: Delays in completing and/or returning the documents listed above or sending incomplete documentation may result in a delay of funding.

If you have any questions, please call the RealTrust Operations Center at (509) 888-8100.

Thank you,

RealTrust Operations

Operations Center
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