



# ASSET PURCHASE DIRECTIVE

Real Choice. Real Control. Real Wealth.

## 1. GENERAL INFORMATION

IRA Participant:

Account #:  Account Type:

## 2. INVESTMENT INFORMATION

Asset Description:

Settlement Agent Contact Information:

Percentage of Asset Ownership:  Total Purchase Price:

### IF YOU ARE PURCHASING:

- 1. REAL ESTATE - IS THE PROPERTY TO BE MORTGAGED? YES NO
- 2. PROMISSORY NOTE(S) - THIS IS A NEW NOTE EXISTING NOTE  
 IS THIS A SECURED NOTE? YES NO  
 INTEREST RATE: \_\_\_\_\_ MATURITY DATE: \_\_\_\_\_
- 3. OTHER ASSETS - NO. OF UNITS \_\_\_\_\_ PRICE PER UNIT: \_\_\_\_\_

### PLEASE INDICATE HOW YOU INTEND TO FUND THE INVESTMENT:

CHECK

WIRE (Please complete Outgoing Wire Instructions Form)

Make check payable to: \_\_\_\_\_

Mail check to: \_\_\_\_\_

SPECIAL INSTRUCTIONS:

## 3. SIGNATURE OF IRA PARTICIPANT

By signing below, I hereby acknowledge having been advised by Administrator to seek the advice of independent legal, tax and/or investment counsel prior to executing this Directive. I further acknowledge that neither Administrator nor Custodian hereunder offer legal, tax or investment advice with respect to the subject matter hereof and it is incumbent upon me to obtain such advice from qualified third parties prior to initiating the instant directive. I understand and agree that I have the sole responsibility for the investment of the assets held within the account established hereunder and compliance with the legal requirements pertinent thereto. I further acknowledge that the only responsibility Administrator and/or Custodian have under this directive, or otherwise, is to follow my appropriate written instructions (upon forms supplied by Administrator). Administrator and/or Custodian are not fiduciaries with respect to me or the subject account and will not determine the suitability of such investment or its compliance with applicable law. I understand and acknowledge that it is my responsibility to determine whether any activity undertaken within the subject account may constitute a Prohibited Transaction pursuant to IRC §4975 and/or may give rise to any tax consequences (e.g.– Unrelated Business Taxable Income, etc.). I hereby release, indemnify and hold Administrator and Custodian harmless from any and all liability of any nature whatsoever that may arise as a consequence of Administrator and/or Custodian carrying-out the directives I am providing hereunder.

IRA PARTICIPANT'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_