IRA ACCOUNT TRANSFER GUIDE
TO MIDLAND TRUST

IGNITE
INVESTMENTS

Ignite Investments' preferred IRA custodian is Midland Trust, a self-directed IRA & retirement account custodian specializing in alternative assets. The initial account setup and transfer request should take less than 15 minutes.

GATHER BEFORE YOU BEGIN

DRIVER LICENSE

Driver's License

CARD

Credit Card

Current IRA Account Statement

Optional: Beneficiary Information

GETTING STARTED

CLICK HERE

QUESTIONNAIRE GUIDE

Please refer to the following table when answering survey questions:

How would you like to fund your account?	▪ If changing custodians, select "Transfer from Another Account" ▪ If this is a new account, select "Make new cash contribution"
Referral or Group Code	▪ None – Leave this blank
Fee Agreement	▪ Select any option since this will be disregarded as the negotiated fee schedule will pull through when using the link above ▪ Payment Method: Most clients choose to have fees deducted directly from the account
Account Notifications	▪ Choose statement preference & identify any third parties such as your CPA or financial advisor who should also have account access

Fund Account	▪ If new contribution, enter bank information
	▪ Transfer Type:
	  ▪ Cash, if transferring cash
	  ▪ In-Kind, if moving an investment holding(s)
	
	**Be sure to upload a statement from your current custodian*

Investment Amount	▪ Enter "$1" – This is a system requirement

FINAL STEPS

Upon completing the survey, please download your signature card, print and sign the form, and email to mcalhoun@midlandira.com. Midland will contact your current custodian to close the account and work directly with Ignite's Investor Relations team to re-register your partnership interest(s).

1. Download Your Signature Card
2. Transfer Form to Print & Sign
3. Email or Fax to Midland IRA

PRICING SCHEDULE FOR IGNITE INVESTMENTS INVESTORS

MIDLAND TRUST CONTACTS

MATT CALHOUN
New Account Specialist

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- (239) 333-4461

KELSEY DINEEN
Director

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- (239) 333-4920

FEE SCHEDULE FOR TRADITIONAL, ROTH, SEP, AND INHERITED IRAs

The following is a summary of fees for Midland services. Other applicable charges listed on Midland IRA's standard fee schedule will apply. Midland will reimburse any account closing fees incurred from your existing custodian to transfer and close your current account.

Account Setup Fee	$50
Annual Account Maintenance Fee	$75
Annual Asset Fee (per asset)	1st & 2nd: $125 3rd & beyond: $75
Transaction Fee (purchase, sale, capital calls, etc.)	$25
Domestic Wire Fees	In: $15 Out: $30

MIDLAND SERVICES

- Maintaining account and customer data
- Online access through Midland360
- Providing IRS documents
- Preparing and mailing annual required minimum distribution notices
- Filing federal and state withholding tax
- Preparing and filing IRS Forms 1099 and 5498, as requested
- Dedicated representative for IRA questions and transactions assistance

For questions, please contact Azure Erickson at ae@igniteinvestments.com or Nami Nafissi at nn@igniteinvestments.com.