

MidAtlanticIRA

Self-Directed IRAs & Tax Strategies

Investment Interest

Thank you for choosing *MidAtlantic IRA*! In order to serve you better, we ask that you complete the below information. Upon receipt, our Client Services Department will send you an outline of the purchase process for the type of investment in which you are interested in.

First Name **MI** **Last Name** **Date** / /

Contact Phone (.....) **Contact Email**

Type of Account(s) You Are Opening: (circle all that apply)

Traditional IRA **Roth IRA** **SEP** **SIMPLE IRA** **HSA** **ESA/Coverdell**
Individual (k) **Beneficiary IRA (Traditional, Roth, SEP, SIMPLE)**

Interested In: (circle all that apply) **Anticipated Purchase Date** / /

Real Estate **Secured Loan** **Unsecured Loan** **LLC** **Private Stock** **Public Stock**
Precious Metals **Forex Trading** **Other Description**

Any Additional Comments:

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Mail or Fax Investment Interest Form to :

MidAtlantic IRA, LLC
118 West Church Street | Frederick, MD 21701
301 / 695.6244 Fax

If you have any questions regarding your investment interest, please contact our Client Services Department at 800/ 607.0145 x208.

Office Use ONLY	<input type="checkbox"/> In ACT! Acct #
	<input type="checkbox"/> Info Sent / /