

Payment of Fees

A Valid Credit Card must be on file for all accounts except Prepay. I understand I may change my payment method with 15-business days notice and that I need to fill out a new Payment of Fees Method Form.

Please Fax or MAIL to:

MidAtlantic IRA, LLC
125 South Carroll Street, Suite 250
Frederick, Maryland 21701

240/575.3880 office

301/695.6244 fax

CHOOSE ONE

- Charge Credit Card** / Please charge ALL my fees to the credit card below, I acknowledge it is my responsibility to update my credit card if it becomes expired or is no longer valid. If it is declined a \$25 fee will be incurred and you will deduct any unpaid fees from my IRA account.
- Deduct Fees from my IRA Account** / I prefer my fees to be deducted from my IRA account I have with MidAtlantic IRA, LLC. I understand I MUST STILL have a valid credit card on file and that this credit card will ONLY be charged if there is NOT enough money in my IRA account to pay for my fees. I acknowledge a \$25 insufficient funds fee will be incurred if there are not enough funds in my account and I do not have a valid credit card on file.
- Prepay** / I prefer to prepay two years of my estimated fees (\$1000)-(based on one asset in the account). If there is more than one asset, you will provide me with the appropriate prepayment amount. This prepayment will be posted as a credit on my account. Any unused monies will be returned to me once the account is closed. I understand when the credit on the account goes below \$400, I am required to fund the account to \$1000. (Interest will NOT be paid on these monies.)

Name of Account Holder _____

Account # (s) _____

CREDIT CARD INFORMATION (REQUIRED - SEE ABOVE)

Mastercard Visa American Express Discover

Card # _____

Expiration Date _____ **3-Digit Code on Back of Card or 4 digit on front (if AMEX)** _____

Name as it Appears on Card _____

Billing Address _____

CC Holder Signature _____

Date _____

FOR OFFICE USE

- All fields filled out Verify readable - CC # & Exp date Account #'s designated Signed & Dated
- Update in ACT (in Account Tab) Update in QB (Payment Method - EACH Cusip) Process CC (for outstanding bills) Shred old POF/CC forms

UPDATED ___/___/___ by _____