



FEE AGREEMENT

(Fees are subject to change)

IRA PLUS SOUTHWEST, LLC

THE IRA EXPERTS

Account Number: _____

Fees are not prorated.

Account Set-up Fee **\$50**

Annual Account Maintenance Fee **\$125**

	Annual Storage Fee	Annual Holding Fee (Per Asset)	Transaction Fees (purchase, sale, etc.)
Real Estate	N/A	\$150	\$150
Real Estate with a Mortgage	N/A	\$200	\$150
Notes & Mortgages	N/A	\$75	\$50
LLC, LP, Private Placements	N/A	\$100	\$50
Trading Account	N/A	\$100	\$75
Precious Metals	\$1.00 per \$1,000 value, with a \$100 minimum	\$25	\$50

INCIDENTAL FEES

Roth Conversion / Recharacterization	\$75
Wire Transfers	\$25
Custodial Check	\$5
Overnight or courier delivery	Domestic - \$30, International - \$10 + actual delivery charge
Returned checks or wires	\$25 per item
Change of asset ownership	Quoted individually
Termination fee	\$125

Fees for services not listed may be charged at the discretion of IRA Plus Southwest. (such as a rush fee)

SELECTION OF FEE PAYMENT ARRANGEMENT

Please choose your preferred method of payment below. **You must choose one.**

A separate check may be enclosed for set-up and first year fees

Debit My IRA Account - appropriate cash balance must be kept. If your account does not have adequate cash for fees, you will be invoiced.

Invoice - a fee of \$5 per invoice applies

Credit Card *(Account Holder's credit card information listed on the next page is **required** if credit card option is selected.)

* All credit card payments are subject to an additional 3% convenience fee. A \$25 fee applies for a declined credit card.

If no payment method is selected, fees will be deducted from your account to the extent there is cash available in your account. If your account does not have adequate cash to pay fees, you will be invoiced and applicable invoicing fees will apply.

The balance that appears on invoices or statements shall be payable in full no later than thirty (30) days from the date of the invoice or statement. All past due sums shall bear interest at the lesser of eighteen percent (18%) per annum (1½% per month) or the maximum allowed by law commencing on the day from and after such sum is due and payable. Failure to make payment in full constitutes a default. Assets may be liquidated to pay for such fees, as outlined in the 5305. I understand this fee agreement and agree to be bound by its terms.

Printed Name: **X** _____

Signature: **X** _____ Date: **X** _____

Account Number:

[Empty box for Account Number]

CREDIT CARD INFORMATION

* If you selected for fees to be paid by credit card, please supply the necessary information below. This information will be used solely to pay fees for your IRA account and will be kept confidential. All credit card payments are subject to an additional 3% convenience fee.

Name: (as it appears on your Account Application)	Social Security Number:
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Name of Cardholder: _____ (as it appears on card)

Credit Card #: _____ **Expiration Date:** _____ / _____
Month Year

Card Type: Visa Mastercard Discover **Card Security Code:** _____

Cardholder Billing Address:

Street: _____

City, State, Zip: _____

Email Address: _____

By executing this credit card Agreement, I authorize IRA Plus Southwest, LLC to charge my credit card for fees.

I understand and acknowledge that there will be a \$25 fee charged for a declined credit card.

Printed Name: **X** _____

Signature: **X** _____ **Date:** **X** _____

FOR SECURITY REASONS, please do not fax this form without calling our office first.