

Account Number:

Complete this Investment Authorization form if you would like to make a purchase or a sale from your IRA Account.

1 ACCOUNT HOLDER INFORMATION

Legal Name: _____ Soc. Sec. Number: _____

2 I HEREBY AUTHORIZE IRA PLUS SOUTHWEST, LLC TO COMPLETE THE TRANSACTION DESCRIBED BELOW FOR MY IRA:

(Please select one of the following)

- Purchase
 Sale

3 NAME OF ASSET:

4 DESCRIPTION OF ASSET: (E.G. REAL ESTATE, LIMITED PARTNERSHIP, LIMITED LIABILITY COMPANY, STOCK)

5 TOTAL AMOUNT OF TRANSACTION: (CHECK ONE BOX AND ENTER AMOUNT IF APPLICABLE)

All available cash less \$ _____ OR \$ _____

6 ADDITIONAL INSTRUCTIONS:

If you are instructing IRA Plus Southwest, LLC to PURCHASE an asset through your IRA, please complete the following sections:

7 PAYMENT INSTRUCTIONS (CHOOSE ONE):

Make check payable to Payee/Seller

Name and address of Payee/Seller

Name: _____

Address: _____

Wire funds to Payee/Seller (Additional fee applies, per fee agreement)

Wiring instructions:

Bank Name: _____

ABA/Routing Number: _____

Account Name: _____

Account Number: _____

Account Address: _____

8 SUBSCRIPTION DOCUMENTS AND/OR OTHER LEGAL DOCUMENTS REQUIRING SIGNATURES MUST BE ATTACHED.

I, the above named account holder, hereby agree, acknowledge and represent the following:

A. I acknowledge and agree to all of the provisions, and specifically the investment provisions, of the Form 5305 (Custodial Agreement) that is hereby incorporated by reference into this section of the Investment Authorization form. I agree and acknowledge that neither IRA Plus Southwest, LLC nor the Custodian is a fiduciary with regard to my IRA.

B. I further agree and acknowledge that I have the sole responsibility for the investment of my IRA assets with IRA Plus Southwest, LLC and that IRA Plus Southwest, LLC and the Custodian named in the Form 5305 (Custodial Agreement) shall have NO LIABILITY for any losses, expenses, damages (of any kind), costs, including court costs and attorney fees, or taxes, including tax resulting from prohibited transactions or disqualification of my IRA resulting from transactions executed by IRA Plus Southwest, LLC and/or Custodian and authorized by me, my power of attorney or other authorized representative.

C. I agree and acknowledge that IRA Plus Southwest, LLC and the Custodian have not provided and do not provide any investment management or advice, legal and/or tax advice and will not be responsible for any investment results (gain or loss) of this or any asset in my IRA.

D. I agree and represent that I have performed or will perform the necessary and required due diligence of a prudent investor with regard to the investment and investment sponsor, including but not limited to, obtaining and reading any applicable prospectus, private placement memorandum, offering circular or similar document prior to authorizing IRA Plus Southwest, LLC and/or Custodian to make this investment on behalf of my IRA.

E. I agree and acknowledge that IRA Plus Southwest, LLC and/or Custodian do not review or evaluate any investment or any sponsor of any investment.

F. I agree to defend and indemnify IRA Plus Southwest, LLC and the Custodian and to hold them harmless from and against **all losses, expenses, damages (of any kind), costs, including court costs and attorney fees, or taxes, including tax resulting from prohibited transactions or disqualification of my IRA** resulting from transactions executed by IRA Plus Southwest, LLC and/or Custodian and authorized by me, my power of attorney or other authorized representative either orally or in writing, or otherwise in connection with this or any investment which I hold in my account.

G. I acknowledge and represent that I have reviewed and understand Internal Revenue Section 4975 "Tax on Prohibited Transactions" including the definition of a "disqualified person" either personally or by obtaining competent legal advice. In addition, I further acknowledge and represent that the purchase or sale of the above named investments will not create a prohibited transaction under Internal Revenue Section 4975.

H. I agree and acknowledge that I am responsible for providing IRA Plus Southwest, LLC the end of the year (12/31) fair market value for each of my investments as stated in Form 5305 (Custodial Agreement).

I. I represent, agree and acknowledge that I understand the requirements of Internal Revenue Code Section 401(a)(9) Required Minimum Distributions with respect to my IRA account including the severe penalties (50% excise tax) for not making timely Required Minimum Distributions. I further agree and acknowledge that I am responsible for determining the amount and requesting distribution of any Required Minimum Distributions.

J. I agree and acknowledge that I am responsible for any Unrelated Business Taxable Income that may be generated by my IRA investments and that I am responsible for the proper filing of Form 990-T and payment of any required tax.

Printed Name: **X** _____

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