TRANSFERRING A PRIVATE PLACEMENT

From a prior Custodian to an IRA LLC

CLIENT	1	Submits: a) Transfer Authorization, b) Re-registration Confirmation (IRA LLC Version), c) Copy of recent account statement from current Custodian, and d) IRA to IRA LLC Transfer form (this can be sent later in the transfer process).
MTC	2	a. Forwards the Transfer Authorization to the client's current Custodian requesting that they transfer this asset to MTC. b. Completes Section G of the Re-registration Confirmation (which further transfers the investments to the client's IRA LLC) and forwards it to the Investment Sponsor.
CURRENT CUSTODIAN	3	Sends confirmation to MTC that they transferred the asset to MTC.
INVESTMENT SPONSOR	4	Signs the Re-registration Confirmation and mails it back to the client.

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