

CLIENT

1

Submits: a) Transfer Authorization, b) IRA LLC Amendment & Resolution, c) Copy of IRA LLC Operating Agreement, d) Documents certifying formation of the entity, e) Evidence that the entity is in good standing, and f) Copy of recent account statement from current Custodian.

MTC

2

Forwards the Transfer Authorization and IRA LLC Amendment & Resolution to the client's current Custodian requesting that they transfer the IRA LLC to MTC.

CURRENT
CUSTODIAN

3

Signs the IRA LLC Amendment & Resolution and sends it back to MTC.

MTC

4

Forwards a copy of the fully executed IRA LLC Amendment & Resolution to the client to attach to the IRA LLC's Operating Agreement.