

# REFER A FRIEND PROGRAM GUIDE

HELP A FRIEND, EARN A REWARD

**RETIREMENT FREEDOM STARTS HERE**

**EARN \$200 FOR EVERY SUCCESSFUL REFERRAL,  
WITH NO LIMIT TO HOW MANY PEOPLE YOU CAN REFER**

If you've had a positive experience investing with your Self-Directed IRA, you can help others explore alternative assets. You'll reap rewards once they've opened and funded a new self-directed account.

**START CLAIMING REWARDS TODAY**

## HOW REFERRING A FRIEND WORKS

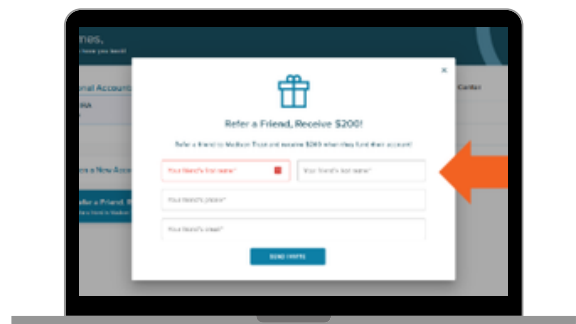
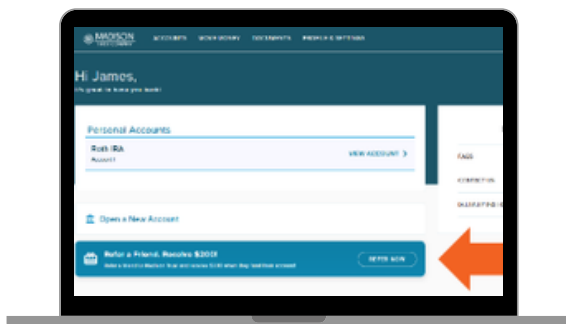
Referring a friend is relatively quick and simple. There are two options for submitting a referral:

### ONLINE REFERRAL FORM

- ✓ Share your experience with a friend or family member
- ✓ Submit their information through our [Referral Form](#)
- ✓ Following, we'll reach out to them and CC you on the email
- ✓ You'll earn \$200 once their account is opened and funded

### CLIENT PORTAL

- ✓ Share your experience with a friend or family member
- ✓ Log into your [Client Portal](#)
- ✓ Submit a referral directly from your dashboard
- ✓ We'll handle the follow-up and next steps



## WHO CAN YOU REFER?

Think about people who may be:

- ✓ Looking to diversify beyond stocks and bonds
- ✓ Wanting more control over their retirement strategy
- ✓ Knowledgeable in a specific asset class
- ✓ Unaware that they can employ their retirement funds to invest in assets like real estate

## WHAT HAPPENS NEXT?

Once you submit a referral, we'll take it from there. We'll contact your referral directly, providing them with educational resources. Our specialists will answer any self-directed questions they have. From there, we'll guide them through the account opening process and support them until their account is funded.

## REFERRAL REQUIREMENTS

To submit a referral, you'll need:

- ✓ Your name and contact information
- ✓ Your account number
- ✓ Your referral's name, phone number, and email

***It's that easy!***

## ELIGIBILITY NOTES

- ✓ Referrals must not be current Madison Trust clients
- ✓ Our Referral Program is only open to current Madison Trust Clients
- ✓ Self-referrals are not eligible
- ✓ Referrals can only be submitted once

**Disclaimer:** This offer cannot be combined with any other promotions from Madison Trust or its sister company, Broad Financial. A referral incentive of \$200 will be issued for each qualifying account opened by a referred individual. Referral checks will be mailed 30 days after each referred account has been paid in full and remains in good standing.

## FAQs

### Is there a limit to how many people I refer?

There's no limit to the number of referrals or rewards you can earn.

### What if my referral opens or funds multiple accounts?

You'll receive \$200 for each account that is opened and funded.

### How can I receive my reward?

You'll receive your reward as a check.

### When do I receive my reward?

Rewards are issued after your referral's account is funded. Your check will be mailed out the month the referral's account is funded.

### What qualifies as a funded account

An account is considered funded once they've provided an initial cash contribution, or they transfer or rollover funds from an existing retirement plan. Once the funds from any of these three methods enter their account, the account is funded.

## START A REFERRAL TODAY

### Know someone who could benefit from a Self-Directed IRA?

Submit a referral in just a few minutes and earn \$200 when they open and fund an account.

**REFER A FRIEND TODAY!**

Want to learn more? Explore additional resources on our website, including guides, webinars, and educational content.

- ✓ Review our [Flowcharts](#) for step-by-step guides
- ✓ Visit our [Blog Page](#) for additional insights and tips
- ✓ Watch our [Webinars](#) for in-depth education

***Disclaimer:** Madison Trust is a passive custodian and does not provide legal, tax, or financial advice. Please consult your advisor before making investment decisions.*