

To better serve you, below please find the process of making a Real Estate investment purchase in your IRA along with the forms needed to complete the transaction.

NOTE: All documents must be received in good order at least two (2) business days prior to funding. Documents received after 2pm will be considered as received the next business day.

 **Offer Submission**

1. Ensure all offers, counter-offers, and addendums list the buyer as:
 “Vantage Retirement Plans, LLC FBO *Your Name* (Traditional, Roth, SEP) IRA”
2. You sign all offers, counter-offers, and addendums and negotiate the purchase

 **Upon Contract Acceptance** - Submit the following documents and a Vantage representative will contact the Title Company to ensure all closing documents are received prior to funding:

1. **Signed Contract**
2. **Payment Authorization Letter – If earnest money is required**
The following sections must be completed to request an earnest money deposit. Deposits **MUST** be made from the IRA account in direct proportion to the IRA’s Ownership.
 - Account Holder Information (Use your Vantage account number)
 - Payment Information
 - Payment Frequency
 - Transaction Fees
 - Signature and Date
3. **Real Estate Buy Direction Letter** – All the following sections must be completed:
 - Account Holder Information (Use your Vantage account number)
 - Real Estate Asset Details
 - Transaction Fees
 - Delivery Instructions for closing funds
 - Signature and Date

The Closing documents are to be provided by the Title Company to Vantage for review and forwarding to the client. This purchase cannot be transacted until the Closing Documents have been signed “Read and Approved” by the Account Holder.

*The **original** Warranty Deed will be sent to Vantage for safekeeping once transaction is complete.*

Documents submitted to Vantage Retirement Plans:

By Email:

RealEstate@VantageIRAs.com

By Mail:

Vantage Retirement Plans, LLC
20860 N. Tatum Blvd., Ste 240
Phoenix, AZ 85050

By Fax:

(480) 306-8408