



STEP

YOU

VANTAGE

1

Select a Self-Directed IRA
Company and account
type



Offers various types of IRAs
including Traditional, Roth,
SIMPLE, SEP, and HSA

2

Complete an
Application Packet



Opens your Self-Directed IRA
Account

3

Make a contribution or
initiate a Rollover or
Transfer from an existing
IRA or 401(k)



Funds your Account

4

Research and select an
investment from a wide range
of alternative asset investment
possibilities including notes,
real estate, LLCs, and more



Offers financial literacy workshops if
you desire to increase your
knowledge

5

Direct Vantage to
purchase the investment
of your choice



Purchases the asset in the name of
your Vantage IRA

6

Your IRA owns the Asset



Administers income and expenses
flowing through your account in
accordance with your instructions

To learn about the wide range of investments available within a Self-Directed IRA, attend a local Vantage workshop. For more information, visit VantageIRAs.com. Please note that as a Self-Directed IRA Administrator, Vantage does not provide investment, tax, financial, or legal advice. All parties are strongly encouraged to perform their own due diligence and consult with their chosen attorneys, accountants, and financial advisors before entering into any type of investment.