

How to Open Your Vantage Self-Directed IRA

1 DECIDE

What type of IRA to open.

Traditional, Roth, SEP, or Simple? Consult with your financial or tax advisor to determine which IRA best meets your needs.

2 COMPLETE

Complete the Account Application.

Access online to submit electronically or download to print and mail.

[CLICK HERE TO ACCESS THE ACCOUNT APPLICATION](#)

Provide address verification.

Include a legible copy of one of the following to verify your legal residence:

- Drivers license or other government issued I.D.
- Voter registration card
- Copy of a utility bill or insurance statement showing your service address

**The address on your account application must match the address stated on the verification*

Complete the Fee Schedule.

To open your IRA, there is a \$50 account set-up fee.

3 SUBMIT

After clicking [here](#), your account application can be submitted two ways:

- 1) Electronically by clicking the [SUBMIT ONLINE](#) button
- 2) Click the [PRINT & MAIL](#) button to download the forms then mail to our office:
Vantage Retirement Plans - 20860 N Tatum Blvd, Ste 240, Phoenix, AZ 85050

FREQUENTLY ASKED QUESTIONS

Why do I need Vantage to open a Self-Directed IRA account?

IRAs must be established and administered by a bank, financial institution, trust company, or authorized Self-Directed IRA Provider. However, not all institutions allow your IRA to invest in alternative assets.

What does Vantage do that I can't do on my own?

IRAs and other qualified accounts cannot be held personally. Vantage provides all the same FDIC insurance, account recordkeeping, and IRS reporting as traditional financial institutions who offer IRAs.

How many accounts should I have/open?

There is no limit to the number of alternative assets you can have in one IRA account. However, based on your retirement goals, you will want to consult your financial or tax advisor to determine which IRA best meets your needs.

How do I know if I'm the right type of investor for a Self-Directed IRA? Is there criteria for it?

There are no requirements or criteria that you need to meet to be a Self-Directed IRA investor. You will have complete control over your financial future and what you choose to invest in. Vantage will be with you every step of the way.

How do I find out what the current contribution limits are for my retirement plan?

[Click here to view our IRA Options tool](#)

How long does it take to open an account?

When all paperwork has been completed and received in good order, a new account can be opened within three business days.