

# IS A SELF-DIRECTED IRA RIGHT FOR YOU?

While your 401(k) may qualify for a rollover into an IRA based on a life event, you still want to make sure the investment you choose is right for you. Below are some key questions to ask yourself before choosing to invest in a Self-Directed IRA.

## Am I goal-oriented and self-motivated?

The investor who is most successful with a Self-Directed IRA is the one who is willing to do some legwork in order to earn a heavy-duty return on investment.

## Do I have enough money in my IRA to invest in the assets I want?

We have found that once you reach a balance of \$25,000, typically you are in a position to start investing.

## Am I willing to take some risks?

Like any investment strategy, using a Self-Directed IRA carries risk. The good news is that you are in control and are in a better position to manage that risk.

## Do I have enough knowledge to support my Self-Directed IRA choices?

When you choose a Self-Directed IRA, you are choosing to take control of your financial future. That choice means you need to ensure you're armed with the knowledge necessary to understand and follow all the IRS rules and regulations.



## Do I know a Self-Directed IRA provider?

The rules surrounding a Self-Directed IRA can seem complex so selecting a worthy provider to guide you through the process is key. At Vantage, we specialize in these types of services and would love to speak with you more about your investment needs. But whoever you choose, make sure you find a company you are comfortable working with.

## 401(K) ROLLOVER TRIGGERS

SEPARATION FROM EMPLOYER

DISABILITY

DEATH

DIVORCE

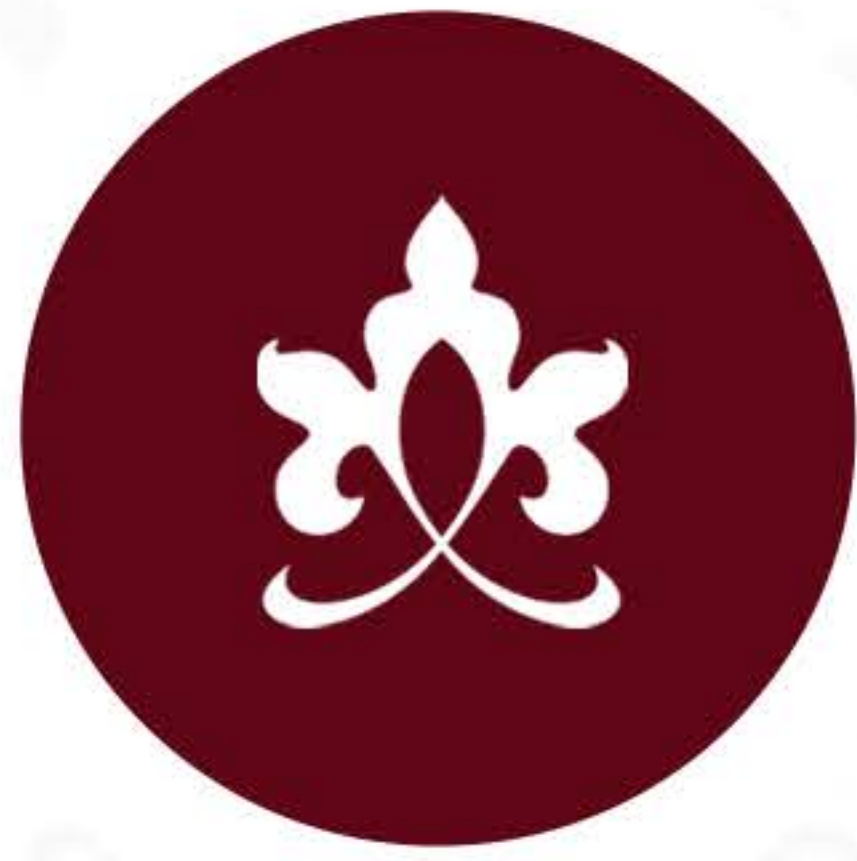
RETIREMENT AGE

(VOLUNTARILY OR INVOLUNTARILY)



# 401(K) ROLLOVER PROCESS

Vantage makes the rollover process easy:



Open your Vantage IRA



Request the form to initiate a rollover from your current 401(k) plan sponsor/administrator



Complete and submit Vantage's Rollover Certification form



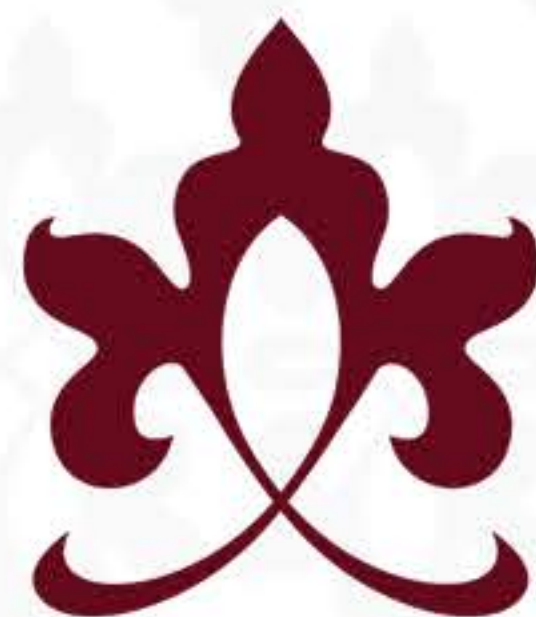
Submit the completed form to your current 401(k) plan sponsor



You're notified that your Vantage IRA has been funded



Purchase the private alternative investment of your choice



VANTAGE®

(866) 459-4580

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