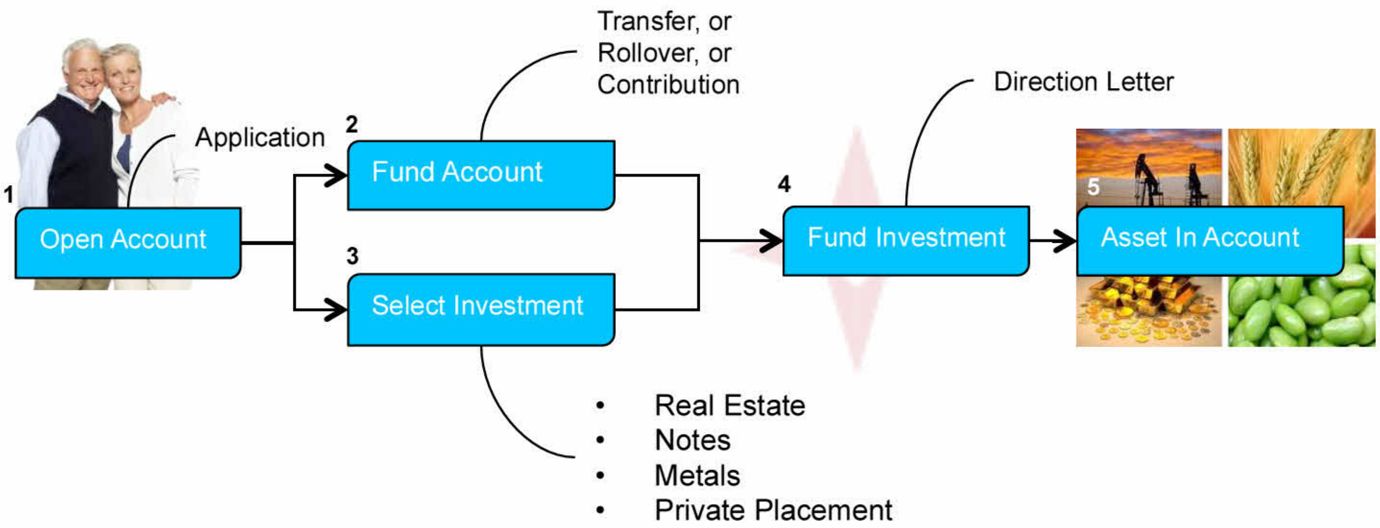
accuplan BENEFITS SERVICES

The Self Directed IRA Investment Process



When considering a self directed IRA go with the industry leader

Accuplan has a trained, professional staff that can handle any type of account or asset that you need to complete your investment.

Fast

We pride ourselves on 24-48 hour turn around times for your transaction

360 Degrees of Visibility

We provide complete event messaging and online account access so that you will always know what is going on with your account

Low Cost Account Fees

Accuplan provides flat, low cost, easy to understand fees for your account.

Service and Support

Every client has a dedicated account representative that oversees and manages your account end-to-end. You can call, email, or chat online with our team to get your needs addressed in a quick, efficient manner

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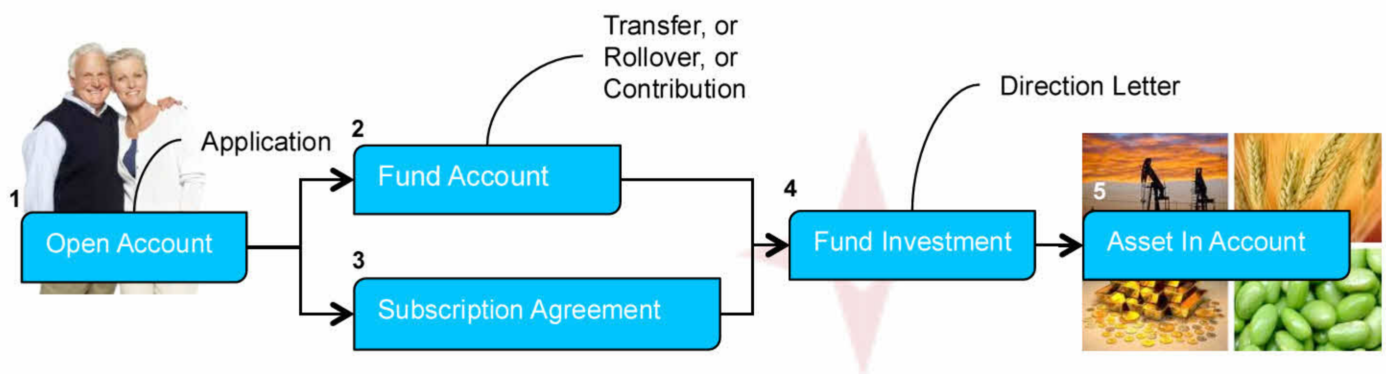
Funding A Private Placement



Key items to note when investing in a private placement or entity

- Submit the private placement docs to Accuplan for review. The private placement will generally have some type of offering document, purchase agreement, membership ledger, or subscription agreement.
- The investor should be "American Estate & Trust FBO <your name>
- The direction letter for funding needs to match the name of the investment and the dollar amount

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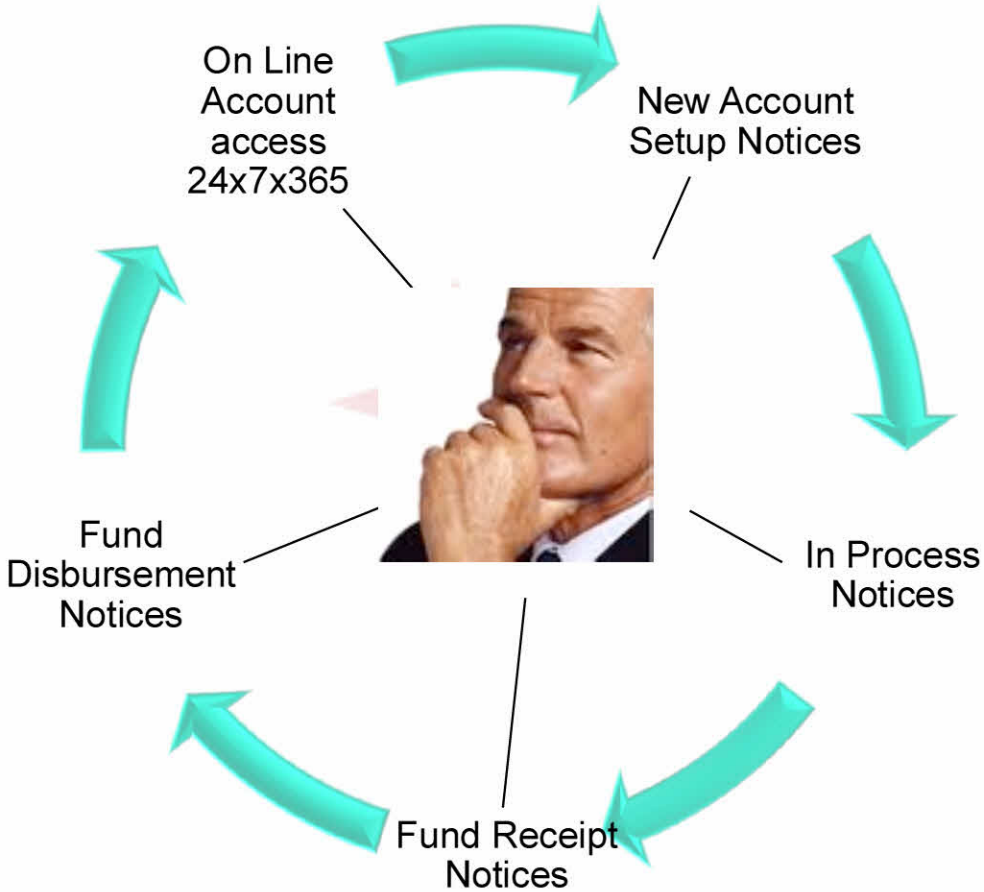
The Accuplan Account Platform – The 360 Advantage

Unlike most IRA/401K accounts we give you 360 degrees of visibility for managing the entire life cycle of your self directed account.

The 360 Advantage will insure that you are always informed and well positioned to take advantage of all self directed investment opportunities.

Precious Metals Advantage
Precious metals values are updated daily thereby allowing you to see up to date asset values for all of your metals holding.



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