



Documents Required Checklist Structured Settlements

These documents are needed to efficiently complete your transaction. Any delays or incomplete documentation can result in the application of hourly charges to the client and delays in closing. Any exceptions need to be documented and must be approved in writing by the administrator. If you have questions, please contact our office at 215-283-2868 ~ 866-559-4430 or email us at operations@camaplan.com.

- ___ Asset Purchase Directive (completed)
- ___ Structured Settlement Purchase Agreement, signed by the buyer and the seller
- ___ Structured Settlement Disclaimer and Indemnity Agreement (signed) (Need Original)
- ___ Structured Settlement Instruction Letter (signed) (Need Original)
- ___ Wiring Instructions (if applicable)

PLEASE NOTE:

Original Documents listed above must be received at least 48 hours prior to funding.

-Funding can only occur if documents are complete and vested properly

-All vesting to read "CAMA SDIRA LLC FBO [your name] IRA"

For example: CAMA SDIRA LLC FBO John Smith IRA

CAMA Self Directed IRA, LLC

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