

1. Go to enroll.camaplan.com or use link provided to you
2. Click the “open an account” link to register your email

Member Sign-In

Email: *

Password: *

[Forgot Password?](#)



Don't have an account yet?

- [Open an account](#) to get started building a portfolio that can earn more than other investments with comparable risk.

Need help? [Contact us](#) or visit our [Help Center](#).

3. Enter in your email address and select a password

Create Account

Email: *

Email Confirm: *

Your password must have 8-40 characters, with at least 1 number and 1 letter. Don't use any of the following: <, >, =, -, &, or ;.

Password: *

Password Confirm: *



4. Select the type of IRA you wish to open (Roth, SEP, SIMPLE, Traditional)
 - a. Choose your [fee schedule](#) (if investing over \$42,000 it will likely be asset based)
 - b. You have the option to add an interested third party to your account – this person may call and speak to us on your account, but cannot make any changes to your account

Select Your IRA

What type of IRA would you like to open: * ?

Type of Fee Schedule: Choose a Fee Schedule * ?

Interested 3rd Party: Choose if Interested 3rd Party * ?



5. Enter in your personal information – You will need your drivers license or passport handy
 - a. If you need to stop and save your progress, you must complete the page you are currently working on and click the next button.
 - b. Required fields have a little green asterisk next to them.

Account Information

First Name: *
 Middle Name:
 Last Name: *
 Address as it appears on Driver's License/Passport
 Address 1: *
 Address 2:
 City: *
 State: *
 Zip: *
 Add separate mailing address
 Home Phone: *
 Mobile Phone:
 Date of Birth: *
 SSN: *
 Gender: *
 Marital Status: *
 Occupation: *
 Email: *
 Have Valid Form of ID: I have a valid Drivers License
 I have a valid Passport

6. The next step is funding your account. You may choose from one of the 3 options

Funding Information

- Cash Contribution
- Transfer
- Rollover

- a. Making a current or prior year contribution (sending cash from your personal bank account)

Funding Information

- Cash Contribution
- Transfer
- Rollover

Cash Contributions

Contribution Previous Tax Year: *
 Contribution Current Tax Year: *

Annual IRA Contribution Guidelines

Year	Max Contribution (if under age 50)	Max Contribution (if age 50 or over)	Contribution Deadline
2019	\$6,000	\$7,000	04/15/2020
2018	\$5,500	\$6,500	04/15/2019

- b. Transferring funds from an existing IRA, Roth IRA, SEP, or Simple
 - i. You will want to have a copy of your account statement available (name on account and account number is required)
 - ii. It is best if you upload a copy of your statement here as well

Funding Information

Cash Contribution
 Transfer
 Rollover

Transfer

Custodian of Account to be Transferred:

Institution Address 1:

Institution Address 2:

Institution City:

Institution State:

Institution Zip Code:

Institution Contact Name:

Institution Phone:

Name On Account to be transferred:

Account Number to be transferred:

Transfer Type: Complete Partial Transfer

I am transferring FROM:

How would you like your cash to be sent from your current custodian:

How would you like us to submit this transfer request:



Upload Current Custodian Statement:

- c. Rolling over from an employer plan like a 401(k), 403(b), annuity or a pension plan
 - i. You will want to have a copy of your account statement available (name on account and account number is required)
 - ii. It is best if you upload a copy of your statement here as well

Funding Information

Cash Contribution
 Transfer
 Rollover

Rollover

 **Information Needed**  **401 (k) Account Number**

* CamaPlan is NOT able to initiate a rollover. The client must contact the sending financial institution to initiate a rollover.

Financial Institution:

Account Number:

Account Type:

Address:

City:

State:

Zip:

Phone:

In Cash In Kind

Rollover Type:

7. The next step is entering in your beneficiaries. Each type of beneficiary must equal 100%
 - a. You will need each beneficiary's SSN and date of birth

Beneficiary Information

Beneficiary 01 Information ?

Beneficiary First Name or Trust:	<input type="text" value="Enter Beneficiary First Name or T"/>
Beneficiary Middle Name:	<input type="text" value="Enter Beneficiary Middle Name"/>
Beneficiary Last Name:	<input type="text" value="Enter Beneficiary Last Name"/>
Beneficiary Date of Birth or Trust Create Date:	<input type="text"/>
Beneficiary SSN Or Trust EIN:	<input type="text" value="___-__-____"/>
Beneficiary Relationship:	<input type="text" value="Choose a Beneficiary Relati..."/>
Beneficiary Mailing Address:	<input type="text" value="Enter Beneficiary Mailing Address"/>
Beneficiary City:	<input type="text" value="Enter Beneficiary City"/>
State:	<input type="text" value="Choose a Beneficiary State"/>
Beneficiary Zip:	<input type="text" value="____"/>
Beneficiary Phone:	<input type="text" value="___-___-____"/>
Beneficiary Type:	<input type="text" value="Choose a Beneficiary Type"/>
Beneficiary Ownership %:	<input type="text" value="100.00%"/>

8. The last step is to read and approve the terms and conditions. Scroll through the webpage, at the bottom, click "accept terms and conditions" Then the signature box will pop up.

Eligibility
Please read through the below terms of your agreement and scroll to the bottom to accept. Once accepting the account opening process is complete.

Terms & Conditions

bear interest at eighteen percent (18%) per annum, (1.5%) per month until paid in full. Failure to pay in full constitutes default under this Agreement. Assets held in your account may be liquidated to pay fees and/or charges, as outlined in the pertinent Custodial Account Agreement. In the event of liquidation and distribution, it shall be the responsibility of the account holder to pay all fees, attorney fees, penalties and any other costs incurred by CamaPlan in such process. Reasonable fees for services not listed above may be assessed. CamaPlan may change all or part of the Fee Schedule at its discretion with 30 days advance notice.

I have selected Option A or Option B as my fee basis. I understand and agree to this Fee Agreement. If no option is selected, Option B will be used to calculate your fee.

9. Use your mouse to sign in the box. Its best to try to get your signature as close as possible.



The image shows a window titled "Acceptance Signature". It contains a large empty rectangular box for signing. Below the box is a toolbar with various icons, including a blue arrow for "undo". At the bottom left of the window is a green "Submit" button. A red instruction reads "Please sign above, just use your mouse."

10. If you need to erase your signature, click the blue arrow to "undo"
11. Once your signature is good, click submit
12. Your account number will appear at the bottom of the page in red text
13. You can download the pdf's that are generated to keep on file. You do not need to send these to CamaPlan.