CamaPlan
Personalized Self Directed IRA Planning

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

3. Enter in your email adress and select a password

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

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:	Choose a State *
Zip:	*
	☐ Add separate mailing address
Home Phone:	*
Mobile Phone:	
Date of Birth:	*
SSN:	*
Gender:	Choose a Gender *
Marital Status:	Choose a marital status *
Occupation:	*
Email:	catcha11456@camaplan.com *
Have Valid Form of ID:	○ I have a valid Drivers License ○ I have a valid Passport

Next

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)

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Cash Contributions

Contribution Previous Tax Year:	Enter Previous Year Contribution	*
Contribution Current Tax Year:	Enter Current Year Contribution A	*

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

Next

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:	Choose an 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:	Choose an account type to t... ▼ * ❓
How would you like your cash to be sent from your current custodian:	Choose a Submission Method ▼ *
How would you like us to submit this transfer request:	Choose a Transfer Method ▼ *
Upload Current Custodian Statement:	_____ [Select]

[Next]

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:	Enter Rollover Financial Institution *
Account Number:	Enter Rollover Account Number * ❓
Account Type:	Enter Rollover Account Type *
Address:	Enter Rollover Address *
City:	Enter Rollover City *
State:	Choose an State ▼ *
Zip:	_____ *
Phone:	___-___-____ *
	☐ In Cash
	☐ In Kind
Rollover Type:	Choose a Rollover Type ▼ *

[Next]

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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

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.

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

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.