

When to use this form:

Please use this form to make deposits of the following kind into your CamaPlan account:

- **Rental Income**
- **Dividends**
- **Loan Payments**
- **Refunds**
- **Contributions**
- **Other Deposits**
- **Sale Proceeds**

To complete your Deposit:

1. COMPLETE AND SIGN THIS FORM

2. IN ADDITION TO THIS FORM, PLEASE SEND US (originals not required):

- A check or money order to CamaPlan
- A scan of this form emailed to operations@CamaPlan.com
- A fax of this form to (973)302-8622

NOTE: If CamaPlan is to receive an incoming wire to your account, please fax/email the deposit coupon before arrival of funds.

3. FOR ASSET SALES/NOTE SATISFACTIONS:

Complete Sale: You are specifying that all payments have been received and you allow CamaPlan to remove this asset from your IRA account.

Partial Sale: This will reduce the invested amount of the asset in your account without removing it from your account. This allows further payments before the asset is closed.

For Real Estate Sale also send:

- Agreement of Sale
- Final HUD
- Deed
- Affidavit
- Seller's Disclosure

*Initial and mark each document "read and approved" and fax or email to CamaPlan for final signatures.

For Note Sale:

- Satisfaction Letter - the note / mortgage satisfaction letter signed by the borrower and you, the client (if applicable)

NOTE: These documents are needed to efficiently complete your transaction. Incomplete documentation can result in the application of hourly charges and/or a delay in the transaction. Any exceptions need to be documented and must be approved in writing by the Administrator.

- All documents should be titled **CAMA SDIRA LLC FBO [YOUR NAME] IRA.**
- Documents listed above must be received at least 48 hours prior to closing.
- Proceeds from the sale of an asset will not be applied to your account until this form has been received.
- Provide CamaPlan's wiring instructions to your buyer so they know where to send the funds. If your buyer is sending a check, please advise them to make the check out as follows: **CAMA SDIRA LLC FBO [YOUR NAME] IRA.**

Mail your Deposit Packet to:

CamaPlan
122 E. Butler Ave, Suite 100
Ambler, PA 19002

What's next?

If you have any questions, please contact our office.

Operations@CamaPlan.com
(866) 559-4430

1. Participant Details

Name

Account Number

2. Deposit Details

Make all payments payable to:

"CAMAPLAN FBO (account holder name) IRA"

For ACH/Wire, please memo with account number / asset name

Deposit Amount \$

Deposit Type (Select one)

☐

A. Rental Income (property description):

☐

B. Loan Payment (list borrower):

Interest \$

Principal \$

☐

C. Contribution (list year):

☐

D. Sale/Satisfaction (Note, Real Estate, LLC/ Private Placement, or Other)

☐

Partial Sale (Leave asset in my account)

☐

Complete Sale (Remove asset from account)

☐

E. Private Placements, Refunds, or

Other Income

☐

Dividend

☐

Distribution

☐

Refund

☐

Other (specify)

3. Special Instructions

Method:

☐

Check

☐

ACH

☐

Wire

Frequency:

☐

Once

☐

Monthly

☐

Quarterly

☐

Annually

Additional Information

4. Signature of Participant

I hereby certify that it is my responsibility to correctly characterize the nature and purpose of the deposit being made hereunder. I understand that CAMA Self-Directed IRA, LLC (Administrator) does not provide legal, tax, or investment advice that it is incumbent upon me to obtain pertinent advise and counsel from qualified third party professionals with respect to the subject matter hereof. I hereby agree to release, indemnify and hold Administrator processing this deposit as set forth herein.

IRA Participant's Signature

Date