

When to use this form:

Use this form to open one of the following Self Directed Account types to invest in Precious Metals:

- Traditional IRA
- Roth IRA
- SEP IRA
- SIMPLE IRA
- Inherited/Beneficiary IRA

NOT for 401k, HSA, or ESA. ONLY FOR PRECIOUS METALS.

To complete your New Account Application:

Submit the following to CamaPlan in a single package:

1. THIS FORM, SIGNED AND DATED:

- Page 3 (section 4)
- Page 7 (section 10)
- Page 8 (choose Option A or B)

2. LEGIBLE COPIES OF:

- Your driver's license or passport
- Your social security card

3. PAYMENT FOR APPLICATION FEE:

Submit payment via:

- Payment method entered online (Existing Clients)
- Check or money order
- Credit Card (call the office)

NOTE: New account cannot be established without payment for the application fee.

If you have questions on completing the application, contact us:

call: (866) 559-4430
or email: Engage@CamaPlan.com

Submit your Precious Metals Application package:

- Email: Engage@CamaPlan.com
- Fax: (973) 302-8622
- Mail: CamaPlan
122 E. Butler Ave, Suite 100
Ambler, PA 19002

What's next?

Within 2 business days of our receipt of your New Account Application package, you will receive:

1. An email containing:
 - Confirmation of account opening
 - Your account number
 - Copy of Custodial Agreement and Disclosure Statement
2. A welcome package via U.S. mail

