How To Invest Your IRA Into a Private Placement

Prior to funding:

You

1

Submit to Madison Trust:

- Investment Authorization form
- Private Placement Memorandum
- If a Private Placement Memorandum is not available, you can submit the company's Operating Agreement, Articles of Organization, and Certificate of Good Standing (if applicable).
- Subscription Agreement showing the IRA's investment amount and ownership
  The IRA as investor should be titled as "Madison Trust Company, Custodian FBO [Accountholder's name & MTC Account #]"

MTC

2

Countersigns the applicable signature pages and returns a copy to you and the Investment Sponsor.

Issues a check or wire from your IRA to the company in the amount specified on your Investment Authorization.

Post-Funding:

You

1

Submit to Madison Trust a fully-executed copy of the Subscription Agreement with the Investment Sponsor's signature certifying that they accepted your IRA's investment.

GO TO INVESTMENT AUTHORIZATION FORM

Corporate Headquarters: Madison Trust Company Inc., 401 E. 8th Street, Suite 200, Sioux Falls, SD 57103 · 800-721-4900