OPENING YOUR FIRST SELF-DIRECTED IRA WITH NEXT GENERATION

1 GET EDUCATED

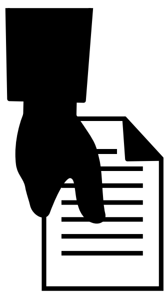
Getting educated is of utmost importance when it comes to self-directing your investments. The IRS imposes several restrictions on what you can/cannot invest in, and with whom you can/cannot invest with. Being aware of these restrictions will decrease your chances of engaging in a prohibited transaction, and will help you maintain the tax-advantaged status of your account.

2 STAY INFORMED

Stay up-to-date with Next Generation as we often share important information about self-directed IRAs and our processes/procedures. To stay in-the-know on what we have going on, or what's trending in the news/industry, subscribe to our monthly newsletter. Also, be sure to keep in contact with our representatives and ask questions - trust us, there is no such thing as a stupid question here!

3 REVIEW APPLICATION

Upon deciding to open an account, you'll receive a Starter Kit which outlines all the important and required documentation necessary to set up your new account. It's important to review all of this information so that your paperwork can be processed in due time. Please call a representative if you have any questions.

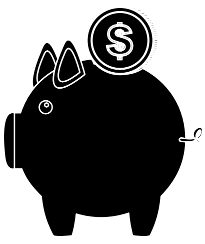


4 SUBMIT APPLICATION

There are a couple of ways we can accept an application. If you're filling out the application by hand, you'll have to mail us the completed documents with original, wet-ink signatures. We can also accept electronic signatures through our DocuSign option. The account opening process usually takes 1-2 business days, so long as we receive completed & correct documentation.

5 FUND YOUR ACCOUNT

You can fund your account in one of three ways: (1) an annual contribution, (2) a transfer, or (3) a rollover. Please be sure to check with a representative to ensure you have completed the correct documentation needed to start the funding process. The account funding process can take anywhere from 1-6 weeks, depending on your funding method and your current custodian's requirements/processing times.



6 MAKE AN INVESTMENT

Once your account is opened and funded, you can make your first investment! You'll work with our friendly transactions team to complete the necessary documentation and direct our office to complete the transaction. There is a 2-5 business day administrative review for all investment documentation, as well as a 2 business day processing time for all transactions.

HAPPY INVESTING!

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