

# FEE SCHEDULE

## SD-IRA & Business Services



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### SD-IRA Services (All fees can be paid with IRA funds)

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SD-IRA Account Creation & First Year Assistance \$500.00

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We will assist you on the creation of your self-directed retirement account including working with custodians to transfer IRA accounts into a self-directed IRA account, advising you through your first year of managing your SD-IRA, and helping you with the necessary tax documents for end-of-year tax filings. We will hold your hand through that important first year while you learn the ropes of how to manage your SD-IRA correctly.

- SD-IRA account creation & initial advising and recommendations to find the right custodian
- One year of free consulting on any SD-IRA questions or issues
- Assisting and advising you with your end-of-year tax documents related to your SD-IRA

This is the best plan to help you get started and grow your SD-IRA with our experienced SD-IRA consultants.

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SD-IRA Account Creation, First Year Assistance, & SD-IRA LLC Formation \$1000.00 + State Filing Fees

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This includes everything provided with our standard SD-IRA Account Creation service, plus we will properly create your SD-IRA LLC, including all the necessary state and federal filings, an operating agreement that is SD-IRA compliant, a tax EIN, and detailed instructions on the "Do's" and "Do Not's" for operating an IRA / LLC.

- SD-IRA account creation & initial advising and recommendations to find the right custodian
- One year of free consulting on any SD-IRA LLC questions or issues
- Assisting and advising you with your end-of-year tax documents related to your SD-IRA & SD-IRA LLC
- Filing with the state of your choice for SD-IRA LLC
- Creation of a compliant SD-IRA operating agreement for your LLC
- Filing for the appropriate EIN for your SD-IRA LLC
- Detailed DO's and DO NOT's for operating your SD-IRA LLC

If you are ready to start and manage your retirement funds with the power and flexibility and SD-IRA LLC provides, then this is the plan for you as you'll save hundreds of dollars versus a law firm creating your LLC plus you'll get that free consulting through your first year that law firms will not do for you without additional fees and exorbitant hourly rates.

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SD-IRA First Year Assistance Only \$250.00

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This service includes assistance with managing your SD-IRA, answering any questions you may have, tax season answers, and being there for you through your first year while you run your SD-IRA or SD-IRA LLC. One of our SD-IRA experts will be your personal advisor when it comes to operating your SD-IRA or SD-IRA LLC – perfect for an individual who is getting started but wanting that extra assistance to make sure things are done properly.

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## Business Services

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### LLC Creation & First Year Assistance

\$750.00 + State Filing Fees

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We will assist you on the creation of your Limited Liability Company (LLC) including all the necessary filings with the state and federal government and your own customized operating agreement. We will hold your hand through that important first year while you learn the ropes of how to manage your LLC correctly including expense/income tracking, tax related LLC management, corporate meeting notes, and essentially all the advice you need to manage your LLC correctly.

For individuals starting new businesses, this is the best plan for you in terms of your LLC creation as we offer this service cheaper than many law firms, and more importantly, we will be there throughout that first year to offer free advice to help you navigate through your business world.

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### LLC First Year Assistance Only

\$250.00

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This service includes assistance with managing your LLC, answering any questions you may have, tax season answers, and being there for you through your first year while you run your LLC. This is the best option for an individual managing their own business who knows a little about operating an LLC but wants that extra assistance and experience from one of our small business experts.

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