

# Real Estate IRA Three-Step Process Checklist

## STEP 1

- \_\_\_ Introduction
- \_\_\_ Real Estate IRA - Method #1 or Method #2  
*(which approach is right for you?)*

## STEP 2

- \_\_\_ Return Real Estate IRA Questionnaire  
*(plus retirement account statements & page 2 of agreement)*
- \_\_\_ Case Development / Consultative Meeting

## STEP 3

- \_\_\_ Professional Recommendation / Your Decision  
*(Is a Real Estate IRA right for you?)*
- \_\_\_ Our Compensation (Fee or No-Fee System)
- \_\_\_ Selection of Custodian
- \_\_\_ Implementation
- \_\_\_ Purchase Your Property