

**When to use this form:**

- To guide through the steps of funding your investment with Stadia Capital Group.
- To provide funding instructions, if investing with private capital.

Private Capital					
1. <input type="checkbox"/>	Submit Stadia Application				
2. <input type="checkbox"/>	Fund Account <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"><input type="checkbox"/> Wire</td> <td style="width: 50%; text-align: center;"><input type="checkbox"/> Check</td> </tr> <tr> <td style="padding: 5px;">               Stadia Capital Group, LLC                First Hawaiian Bank                PO Box 3200, Honolulu, HI 96847                ABA # 121301015   Account # 04118383             </td> <td style="padding: 5px;">               Stadia Capital Group, LLC                P.O. Box 437260                Kamuela, HI 96743             </td> </tr> </table>	<input type="checkbox"/> Wire	<input type="checkbox"/> Check	Stadia Capital Group, LLC First Hawaiian Bank PO Box 3200, Honolulu, HI 96847 ABA # 121301015   Account # 04118383	Stadia Capital Group, LLC P.O. Box 437260 Kamuela, HI 96743
<input type="checkbox"/> Wire	<input type="checkbox"/> Check				
Stadia Capital Group, LLC First Hawaiian Bank PO Box 3200, Honolulu, HI 96847 ABA # 121301015   Account # 04118383	Stadia Capital Group, LLC P.O. Box 437260 Kamuela, HI 96743				
3. <input type="checkbox"/>	Sign Investment Documents via DocuSign - Stadia will send once account has funded				
4. <input type="checkbox"/>	Submit - Return of Earnings & Capital Direction Form				

Retirement Capital – Traditional IRA / Roth / SEP / SIMPLE / Solo(k)	
1. <input type="checkbox"/>	Submit Stadia Application
2. <input type="checkbox"/>	Open Self-Directed retirement account (if needed) <ul style="list-style-type: none"> <li>▪ Stadia will send digital application from preferred custodian portal</li> <li>▪ Please have ID copy and beneficiary information ready</li> <li>▪ Agent Authorization section – please check option to grant Stadia as authorized agent. No action is taken without your approval and signature.</li> <li>▪ Please note that Stadia’s preferred custodian requires a credit card on file for all clients, however Stadia intends to pay all setup and annual administration fees</li> </ul>
3. <input type="checkbox"/>	Fund retirement account (if using Stadia’s preferred custodian) <ul style="list-style-type: none"> <li>▪ IRA Transfer               <ul style="list-style-type: none"> <li>○ Submit current statement copy to <a href="mailto:admin@stadiacapitalgroup.com">admin@stadiacapitalgroup.com</a></li> <li>○ Liquidate to cash – investment amount, plus \$500</li> </ul> </li> <li>▪ Qualified Plan Rollover               <ul style="list-style-type: none"> <li>○ <a href="#">Rollover Contribution Form</a> – submit using instructions on bottom of form</li> <li>○ Request <i>Direct-Rollover</i> with plan administrator. They will typically have their own form to initiate the rollover.</li> <li>○ <a href="#">Deposit Instructions</a> – The rollover check should be made payable to your retirement account, as indicated on deposit instructions.</li> </ul> </li> </ul>
4. <input type="checkbox"/>	Sign Investment Documents via DocuSign – Stadia will send once IRA has funded
5. <input type="checkbox"/>	Sign Direction of Investment with preferred custodian – Stadia will initiate

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