CLIENT CHECKLIST

Stadia CAPITAL GROUP

www.stadiacapitalgroup.com | 1-800-893-6184 (inside the U.S.)

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. ☐	**Submit Stadia Application**		
2. ☐	**Fund Account**		
	☐ **Wire**		☐ **Check**
	Stadia will provide wiring instructions after the application is submitted. Also available upon request.		To: Stadia Capital Group, LLC PO Box 437260 Kamuela, HI 96743
3. ☐	**Sign Investment Documents** - Stadia will send once account is funded		

Retirement Capital: Traditional IRA | Roth | Inherited | SEP | SIMPLE | Solo(k)	
1. ☐	**Submit Stadia Application**
2. ☐	**Open Self-Directed retirement account** ▪ Stadia will send digital application from the preferred custodian portal ▪ Please have ID copy and beneficiary information ready ▪ Agent Authorization section – please check option to grant Stadia as an authorized agent. No action is taken without your approval and signature. ▪ 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
3. ☐	**Fund retirement account** ▪ IRA Transfer o Submit current statement copy to admin@stadiacapitalgroup.com o Liquidate to cash – investment amount, plus $500 ▪ Qualified Plan Rollover o Rollover Contribution Form – submit using instructions on the bottom of the form o Request *Direct-Rollover* with plan administrator. They will typically have their own form to initiate the rollover. o Deposit Instructions – The rollover check should be made payable to your retirement account, as indicated on deposit instructions.
4. ☐	**Sign Investment Documents** – Stadia will send once IRA is funded
5. ☐	**Sign Direction of Investment with preferred custodian** – Stadia will initiate

EMAIL & MAILING OPTIONS: admin@stadiacapitalgroup.com
P.O. BOX 4710, El Dorado Hills, CA 95762-9998
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