

<b>Retirement Funds:</b> <b>Traditional IRA   Roth   Inherited   SEP   SIMPLE   Solo(k)</b>	
1. <input type="checkbox"/>	<b>Submit your Completed Stadia Capital Group Application</b>
2. <input type="checkbox"/>	<b>Open Self-Directed Retirement Account</b> <ul style="list-style-type: none"> <li>▪ Stadia will initiate the application.</li> <li>▪ Please have your ID &amp; beneficiary information readily available.</li> <li>▪ Agent Authorization – Please check this box to allow Stadia to assist with your account. No action is ever taken without your signature.</li> <li>▪ A credit card will be requested; however, Stadia will pay the setup fee and ongoing annual administration fees.</li> </ul>
3. <input type="checkbox"/>	<b>Fund Retirement Account (two methods)</b> <ul style="list-style-type: none"> <li>▪ <b>Transfer from IRA:</b> <ul style="list-style-type: none"> <li>○ Liquidate to cash – investment amount, plus \$500.</li> <li>○ Send current statement to Stadia Capital Group.</li> <li>○ Complete transfer request with custodian.</li> </ul> </li> <li>▪ <b>Rollover from Qualified Plan:</b> <ul style="list-style-type: none"> <li>○ <a href="#">Rollover Contribution Form</a> – Stadia can assist you.</li> <li>○ Request a “Direct-Rollover” with your current plan administrator. They typically use their own form(s).</li> <li>○ <a href="#">Deposit Instructions</a> – Check must be made payable to your retirement account.</li> </ul> </li> </ul>
4. <input type="checkbox"/>	<b>Sign &amp; Return Investment Documents</b> – Stadia will forward documents via mail or DocuSign once the retirement account is funded.
5. <input type="checkbox"/>	<b>Sign Direction of Investment with Preferred Custodian</b> – Stadia will initiate.
6. <input type="checkbox"/>	<b>Submit Accredited Investor Verification Documents (Due Within 90 Days)</b> Stadia will forward the request for verification by email and USPS.