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Step 5: Addressing Stock Liquidity, Large Block Sales & Capital Offering Funds

CAMELS Self-Directed IRA Resource Center Makes It Easy to Offer Bank Stock as a Retirement Savings Strategy

An important strategy for increasing stock liquidity, addressing large block sales and accessing capital offering funds is the positioning of long-term investment dollars associated with Individual Retirement Accounts (IRAs) for the purchase of privately-held bank stock in your privately held bank.

CAMELS Self-Directed IRA program offers the ability to leverage this strategy to increase stock liquidity, address large block sales, and provide a funding source in support of capital offerings.

The program enables privately-held community banks the opportunity to secure long-term investment dollars for stock purchases through continual IRA contributions and IRA account transfers or re-classification of existing IRAs. New investors and existing shareholders can place their long-term retirement investment dollars in community bank stock recognized by investment advisors, as a long-term 'hold' investment.

CAMELS Self-Directed IRA Resource Center



Welcome to CAMELS Self-Directed IRA Resource Center!

In working with our clients over the course of the past several years we have found that there is never an end to questions or different customer situations where additional resources would prove to be extremely beneficial. It is for this reason that we have put together this Self-Directed IRA Resource Center. This site is for the exclusive use by institutions seeking to implement or manage an existing CAMELS Self-Directed IRA program to support ownership and liquidity in their common stock.

This site provides the 'how to' in the design, implementation, and marketing of a Self-Directed IRA for the sole purpose of providing a product for the shareholder or prospective investor to expand their ownership position in your bank. The Resource Center also provides ongoing compliance, operational and product updates.

CAMELS Self-Directed IRA Resource Center is Designed for Immediate Implementation

CAMELS' Self-Directed IRA Resource Center offers a simple yet comprehensive subscription-based solution that allows privately-held community banks the ability to quickly and cohesively implement their own bank stock self-directed IRA program, addressing stock liquidity concerns and the need to support shareholder succession.

CAMELS' Self-Directed IRA Resource Center provides:

- All of the compliance, operations and marketing tools your bank needs to get your Self-Directed IRA program up and running immediately.
- Training methodology to get new staff up to speed quickly and easily.
- Benefits for bank shareholders, banks and/or bank holding companies from investment advantages typically only offered by brokerage firms for publicly-traded stock.

CAMELS Self-Directed Resource Center subscription includes unlimited users and many benefits.

CAMELS Self-Directed IRA Resource Center is a simple, proven solution for community banks/bank holding companies to leverage the benefits of a bank stock invested self-directed IRA program. It's a complete how-to platform that guides your bank from set-up through implementation and beyond, utilizing your existing bank system (when feasible) for building out a complete operational platform and providing comprehensive guidance on:

Opening accounts and ongoing contributions

- Handling of cash dividends
- IRS reporting
- Distribution of stock and cash
- Utilization of available IRA documentation sources and accounting providers such as Wolters Kluwer, Deposit Pro, and Ascensus.
- Providing third-party fair market value (FMV) pricing for stock purchases and annual stock valuations.
- Identification of specialized shareholder accounting system for handling of Self-Directed IRA accounts.
- Creation of marketing programs utilizing CAMELS library of brochures, sales letters, and other resources
- Account mining of IRA opportunities within your bank and through external transfers.

[Request a Tour of the Self-Directed IRA Platform](#)

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