***Suggested Form …. Self-Directed IRA Stock Purchase***

**Bank Logo Here**

**Self-Directed IRA Stock Purchase**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_**

**To: Bank Name Here**

**Re: Stock Purchase with Self-Directed IRA Funds**

**I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby direct Bank Name, as custodian for my self-directed IRA, to purchase \_\_\_\_\_\_\_\_\_\_\_\_ shares of (Bank Holding Company Name/or Bank Name) common stock. I understand that the bank will direct the purchase through the (Bank Holding Company Name/Bank Name) transfer agent. Purchase(s) in whole shares only will be made on available funds in my Self- Directed IRA cash account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and based on availability for purchase of common shares of the (Bank Holding Company Name/Bank Name). Purchases to be made on a quarterly basis.**

**The (Bank Name) will account for purchases either in stock certificate(s) form/or in book entry form. Self-Directed IRA stock ownership will be recorded in the bank’s shareholder accounting records by the Bank. I further understand that, as custodian, the Bank will be completing federal reporting, as required by law. I will request (in advance) in writing, any changes to my IRA. I understand that The Bank acts as transfer agent for (Bank Holding Company Name/Bank Name) and will be purchasing shares at fair market value, at time of purchase.**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**IRA Customer Name**