

FEE SCHEDULE

Self-Directed Retirement Accounts



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ACCOUNT FEES

Setup Fee (One-Time)	\$50		
Traditional IRA & Roth IRA	\$375	Individual 401(k) Plan	\$475
Per Additional Asset ¹	\$75	Additional Participant	\$150
SEP IRA & SIMPLE IRA	\$475	Per Additional Asset ¹	\$75
Additional Participant	\$75	Custodial Accounts	
Per Additional Asset ¹	\$75	Qualified Funds Account	\$375
Inherited Traditional IRA & Inherited Roth IRA	\$375	Non-Qualified Funds Account	\$375
Full Distribution (No Account Setup)	\$250		

ASSET PURCHASE FEES

Crypto Assets		Other Assets	
Setup Fee (Collected from all fund deposits)	2.99%	Real Estate (Buy / Sell)	\$150
Trading Fee (Buy/Sell)	2.0%	Precious Metals (Buy / Sell)	\$50
Annual Fee (Billed monthly)	0.08%		
In-Kind Transfer Out	1.0%		

TRANSACTION FEES

Outgoing Domestic Wire	\$35	Next-Day Processing (Within 24 hours)	\$100
Outgoing International Wire	\$50	Same-Day Processing (Documents received by 10AM)	\$250
Check	\$35	Medallion Stamp	\$35
Cashier's Check	\$50	Overnight Mail	\$35
ACH (\$10,000 or less)	\$15	Roth Conversion or Recharacterization ²	\$100
Stop Payment, Return Check/Wire	\$50	Re-Registration (Per Asset) ³	\$75
Credit Card Declined, Chargeback	\$50	IRS Form Facilitation / Preparation Fee	\$100/each
Duplicate Page Statements	\$50	Legal Action Fee ⁴	\$150/hour
EIN Creation	\$25	Corrective Reporting Fee	\$250/each
Loan Setup Fee (Individual 401(k) Plans Only)	\$225	Late Fee	\$25/month
Loan Default Fee (Individual 401(k) Plans Only)	\$150	Partial Termination (50% or more of Account)	\$150
Plan Amendment (Individual 401(k) Plans Only)	\$150	Complete Termination	\$300
State Tax Withholding	\$35	Precious Metals Storage - Non Segregated	\$150
Special Handling	\$100	Precious Metals Storage- Segregated	\$240

Fees are subject to change with written notice. The annual fee is invoiced in the anniversary month each year. ¹If you are signed up on a platform, the platform will count as one asset for account fee purposes. ²Recharacterizations may only be in cash. Roth conversions may not be recharacterized. ³Any re-registration fees charged by third-parties will be additionally assessed. \$75 re-registration fee applies to each asset. ⁴Relating to production of documents related to subpoena or legal action.