

INSTRUCTIONS TO SELF DIRECT AN IRA TO CFNE

In order to direct IRA funds to CFNE we need to please use the services of Self Direct IRA services, Inc. 215 Mary Ave. Suite 311. Waco, TX 76701

SDIRA Services charges a \$100 annual fee and takes care of reporting to the IRS.

An investor needs to open an account with SDIRA Services and then direct SDIRA Services to send funds to CFNE.

Here is [the fee schedule link](#).



IRA Fee
Schedule.pdf

The contact at SDIRA services is:

Amanda Efirm: Amanda.efird@SDIRAServices.com

Telephone direct: 254-750-1012

Fax: 512-495-9554

Main number: 512-637-5739

Here are the steps:

I) Investors will first need to open an account at Self Direct IRA. If the investor already has an account at SDIRA Services then skip to step II):

New clients:

1. Open the account at SDIRA Services.

To do this fill out the **Application**, by either:

-Filling it out online (\$25 Account Opening Fee) <https://www.sdiraservices.com/get-started/>

Or

-Filling out a paper version then sending it to Amanda via email/fax (\$50 Account Opening Fee) SDIRA [application form link](#)



IRA Custodial
Account Application

2. Fund the account, to do this do one of the following:
 - a) **Transfer Form** used for transferring an IRA or rolling over a 401K) this will pop up at the end of the online account opening but clients will need to print it out and sign it * [Transfer Form Link](#)



Transfer Direct
Rollover Request - E

Or

b)-**Deposit Coupon** (used for rolling over a 401K or making a contribution to a new IRA) this does not pop up on the online account portal here is the [Deposit Coupon link](#)



Deposit Coupon -
ENABLED.pdf

3. Investor clients need to email/fax the above forms to Amanda at SDIRA services

*If the client is transferring from an IRA they will take care of sending the form to the old custodian for the transfer to take place.

BUT if the client is rolling over a 401K, THEY will need to contact their 401K administrator to facilitate the rollover (401K administrators will not take directions from SDIRA Services).

II) The next step is to invest with CFNE

Both new and existing SDIRA Services clients:

1. Contact CFNE for a [prospectus](#)



2. Fill out the last page and send to CFNE. [Last page form link here](#)
3. Cooperative Fund of New England will create a Promissory Note and send it and the response form to SDIRA Services
4. Fill out the SDIRA [Public Investment Direction Form link](#)



Investment
Checklist and Invest

5. The investor client must sign both the prospectus response form and the Public Investment Direction Form.
6. Send both prospectus response form and the Investment Direction Form to CFNE admin office, 5533 Peden Point Road, Wilmington, NC 28409. They will get forwarded to SDIRA with the promissory note.
7. Funds are sent from SDIRA Services to CFNE.