



MILLENNIAL INDIVIDUAL RETIREMENT ACCOUNT FEE SCHEDULE

MAILING ADDRESS
 Horizon Trust Company
 P.O. Box 30007
 Albuquerque, New Mexico 87190

FOR OVERNIGHT NIGHT MAIL ONLY:
 Horizon Trust Company
 6301 Indian School Rd. NE, Suite 614
 Albuquerque, NM 87110

P: 888-205-6036 • F: 505-288-3905 • Operations@Horizontrust.com

FEE SCHEDULE: Traditional, Roth, SEP, SIMPLE

Activation Fee*	\$400	
Annual Fee ¹	Multiplier	Minimum Fee
\$0 - \$50,000	.00777	\$250
\$50,001 - \$100,000	.00431	\$375
\$100,001 - \$200,000	.00266	\$425
\$200,001 - \$1,000,000	.00210	\$525
\$1,000,000 and Up	Customizable	
Annual Buy/Sell Transactions Included	4	
Additional Buy or Sell Transactions	\$50	

The buying or selling of an asset constitutes a transaction

*Millennial accounts will receive the following upon the opening and funding of a new account:

1. One-on-One Consultation with a Self Directed Wealth Specialist
2. Self Directed, Self Made Success eBook
3. Monopoly for Millennials

SERVICES & OPTIONAL FEES

Express Account Open ² (recommended)	\$50	Stop Payment	\$30 each
IRA Distribution Fee	\$8	Returned Check Fee	\$30 each
Check Fee/ACH Fee	\$5	Late Fee	\$25 per 30 days
Cashiers Check	\$15	Termination Fee	\$400
Express Investment Processing Fee (same day/24hrs)	\$50	IRA Special Service Fee	\$100 per hour <i>(this includes but is not limited to extensive research)</i>
Wire Fee	\$35 each	Roth Conversion/Re-characterization Fee	\$75 + \$25 per asset
Overnight Mail Fee	\$40	Partial Transfer Out	\$75
Document Handling Fee	\$5	Matured Note	\$75

FOOTNOTES

1. The annual fee is billed in the anniversary month each year.
2. Express Account Open significantly reduces the transfer time of your funds.
 - Fees are subject to change with 30 days notice.
 - A \$500 cash balance is required in the account at all times.

Signature : _____ Date : _____