

(888) 205 - 6036 (505) 212 - 0494 operations@horizontrust.com

Horizon Trust Correspondence, PO BOX 27068, Newark NJ 07101

## ACCOUNT OWNER INFORMATION

First Name:	M.I.:	Last Name:	Account #:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address:	Apt/Unit/Ste:	City:	State:	Zip:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary Phone:	Type:	Email Address:		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

## TRADITIONAL, ROTH, SEP, SIMPLE, 401K INVESTMENT LLC

A Third Party Vendor will establish your IRA/401K LLC on your behalf. The vendor will complete all necessary paperwork to file your new IRA/401K LLC and provide all supporting documentation to transfer funds from your IRA/401K to your new LLC.

### LLC Setup Options *Please select a LLC Option:*

- LLC Set Up Fee with State Filing Fee (Recommended): \$1,500**
- LLC filing with the state
  - State filing fees
  - 1 Year of Registered Agent
  - Specialized Operating Agreement
  - Articles of Organization
  - EIN Letter
  - Bank Account Set-Up Guidance
- LLC Set Up Fee: \$1,000**
- LLC filing with the state
  - Specialized Operating Agreement
  - Articles of Organization
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### LLC Fee Payment Options *Please select a payment option:*

- Deduct from Account     Charge Credit Card *(Complete Credit Card Payment Method Section)*

### Credit Card Payment Method

I have read and understand the LLC setup charges. I certify that all information provided by me is true and accurate. I assume responsibility for any consequences that may result from this transaction and I agree that the custodian is not responsible for any consequences that may arise from executing this credit card authorization.

Select a Credit Card Type:

- Visa     Mastercard     American Express     Discover

Cardholder Name:

Card Number:

Expiration Date: (MM/YY)

Security Code:

Billing Address:

Apt/Unit/Ste:

City:

State:

Zip:

Signature of Account Owner:

Account Owner Name: *(Print or Type)*

Date: *(MM/DD/YYYY)*