



## Documents Required Checklist Notes and Mortgages

Use this checklist to submit items to purchase a Precious Metals in your IRA  
Send all items for purchase at least 48 hours prior to funding

After your Precious Metals IRA account has been established and funded

Choose a Precious Metals Dealer:

Open dealer account in the name of your IRA (see proper vesting below)	➔	Send a copy of the application & verification documents to CamaPlan (our signature may be required).
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**Vesting to Read:** CAMA SDIRA LLC FBO [Client Name] IRA  
*For example: CAMA SDIRA LLC FBO John Doe IRA*

### Existing Note Requirements

**Lender Name:** "CAMA SDIRA LLC FBO (CLIENT'S NAME) IRA"

Example: CAMA SDIRA LLC FBO John Doe IRA

**Lender Address:** 512 E. Township Line Road, 5 Valley Square Ste. 200, Blue Bell, PA 19422

**Documents required for existing notes prior to funding (must be received at least 48 hrs prior to funding)**

Asset Purchase Directive /	➔	Completed and signed by client
Asset Purchase Disclaimer and Indemnity Agreement	➔	Read and acknowledged – keep for your records
Note Assignment	➔	Signed by Assignor and Client – mail original
Copy of Original Note	➔	Provide copy
Existing Note Acknowledgement	➔	Completed by Signer/Borrower

These documents are needed to efficiently complete your transaction. Incomplete documentation can result in the application of hourly charges and/or a delay in your transaction. Any exceptions need to be documented and must be approved in writing by the Administrator. If you have any questions regard these documents, please contact our office at 215.283.2868 ~ 866.559.4430 or email us at [operations@camaplan.com](mailto:operations@camaplan.com).

CAMA Self-Directed IRA, LLC

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