American IRA
Self-directed IRA Services

To Open an Account
Visit our website.

Open an Account

Simple steps to opening, funding, and purchasing an asset using a self-directed IRA. Our staff will provide you with personalized, first class, flexible customer service. To get you started, we have provided these quick and EZ account opening instructions.

Step 1. – Open a New Account by:

- Completing our EZ IRA Account Opening Kit
- Providing us with a copy of your driver's license (Mandatory for Patriot ACT compliance)
- Submitting your $50 account opening fee by check (payable to: American IRA, LLC) or Credit Card or you may elect to have this fee deducted from your account once it is funded.

All of these are required to open an account.

Note: Please submit the items in Step 1 to our office via fax, mail, or e-mail.

Step 2. Decide how you will fund your new account and complete the necessary forms (listed below).

- Transfer Form Download-Custodian to custodian transfers of IRA, Roth IRA, SEP, and SIMPLE accounts.
- Rollover Form Download-When you have already received the funds from your previous employer or IRA provider and are opening a new account within 60 calendar days.
- Direct Rollover Form Download-From a 401(k) or Pension Plan directly from your current provider.
- Deposit/Contribution Form Download

Note: Once you have completed the necessary form in Step 2, provide us with the originals by mailing them or by bringing them to our office along with a copy of your current plan statement.

Step 3: Decide what you would like to invest in and initiate the transaction by:

- Completing our Buy Direction Letter
- Funding your account
- Reviewing and Signing that you have "read and approved" all required documents

People are amazed at how easy it is to open a self-directed account. It is as easy as opening a checking account at their local bank. They simply open the account, put money in and then purchase assets with the money in their self-directed account.

If you have any questions about this process or need assistance, please feel free to contact our office toll-free at 1-866-7500-IRA(472).

We have free resources available on our website and lots of educational articles and links. Please feel free to visit our website and, as always, our staff is here to help.

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