

Investment Direction

(877) 806-7362 | team@altscustodian.com



Accountholder Information

Account Holder Name

Account Number Assigned by Alts Custodian

Last four digits of SSN (####)

Date Of Birth (Optional) (MM/DD/YYYY)

Type of Investment

- | | |
|--|--|
| <input type="checkbox"/> PRIVATE LENDING (i.e. secured or unsecured notes) | <input type="checkbox"/> PRIVATE EQUITY (i.e. venture capital, PPM, REITs, etc.) |
| <input type="checkbox"/> PRECIOUS METALS | <input type="checkbox"/> INTERNATIONAL |
| <input type="checkbox"/> SINGLE-MEMBER LLC | <input type="checkbox"/> CRYPTOCURRENCY |
| <input type="checkbox"/> DISC (Domestic International Sales Corporation) | |

Investment Titling

Below is an example illustrating the correct format for titling assets. Assets must be titled accurately to reflect your legal ownership of investments. Incorrect titling could lead to processing delays for your requests or even result in taxable consequences.

'Alts Custodian FBO (Your Name) (Account Number)

General Asset Information

INVESTMENT NAME (describe the investment here. Examples: name of the LLC, joint venture, private equity, etc.)	PERCENTAGE OF OWNERSHIP	
	%	
Quantity (number of shares, units, etc.)	PRICE (per share, units, etc.)	TOTAL PURCHASE AMOUNT
	\$	\$

Investment Contact Information

Contact Name: (Company or Individual)

Email:

Phone:

Address

City

State

Zip Code

Outgoing Payment Instructions

PLEASE SELECT YOUR FUNDING METHOD (select one): WIRE CHECK CASHIER'S CHECK ACH

For WIRE and ACH (please complete this section if you selected WIRE or ACH)

ACH PAYMENT NOTICE

Some banks have ACH delivery instructions character limit policies in place. If the bank does not receive all required ACH information due to the character limits, payment processing may not occur. Therefore, selecting ACH could slow down your transaction or result in having to repeat the process if the bank cannot read all the information required to process the payment.

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Outgoing Payment Instructions

PAYEE NAME	BANK NAME		
For Further Credit To	Bank ABA / Routing Number	Account Number	
Payee Street Address	City	State	Zip Code
Additional Information			
Check (Additional fees may apply, see current Fee Schedule for applicable fees.)			
Send check via: <input type="checkbox"/> Regular Mail <input type="checkbox"/> Overnight Mail <input type="checkbox"/> Cashier's Check+ Overnight Mail			
Payee Name:		Payee Tax ID#: (If applicable)	
Payee Street Address	City	State	Zip Code

Account Owner's Acknowledgements

Before proceeding with your signature, please carefully review the following information:

As the designated Account Owner, I acknowledge and accept full responsibility for the following actions prior to Alts Custodian executing the directed transaction:

1. Furnishing comprehensive responses to all suitability inquiries posed by the Investment Sponsor/Issuer to ascertain my Account's eligibility for participation in a purchase.
2. Thoroughly review the subscription/purchase agreement alongside all associated documents essential for the completion of the transaction.

I hereby consent to the terms outlined below and provide the following assurances and guarantees:

Documentation, Declarations, and Suitability Criteria: I have thoroughly reviewed and approved all provided information, including the subscription/purchase agreement, operational memorandum, and any other documents essential for the execution of the investment directed herein (referred to as "Purchase Documents"). This includes an evaluation of any suitability requirements, and I explicitly affirm and assure that I meet all applicable suitability criteria for this investment purchase. I consent to indemnify and absolve Alts Custodian from any and all loss, expense, liability, damage, and cost resulting from the investment.

Investment Ownership Acknowledgment: I recognize and consent that the registered owner of all assets in my Account is Alts Custodian FBO (Account Owner). I affirm that I shall not solicit or receive income payments or other distributions directly from the investment sponsor/issuer of any asset within my Account. Additionally, I commit to refraining from making contributions to any investment except through my Account.

Investment Terms and Risks Assessment: I have examined, endorsed, and am content with all the terms associated with the investment. I have carefully evaluated the risks inherent in this specific investment and conducted a comprehensive review of the underlying investments or operations to the extent I deemed necessary. I acknowledge that, as a general rule, private placements:(!) involve higher risk levels compared to registered securities; (ii) possess extremely limited or no liquidity in contrast to publicly traded investments; and (iii) may present challenges in obtaining timely and precise valuations. I recognize that the responsibility for the promptness and accuracy of such valuations does not lie with Alts Custodian.

Unrelated Business Taxable Income (UBTI) Acknowledgment: In the event that my Account constitutes an IRA or any other retirement account, I acknowledge and understand that should any asset designated for purchase in my Account generate Unrelated Business Taxable Income, I bear sole responsibility for filing a Form 990-T tax return and authorizing my Account to cover the tax on said income.

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Hereby, I agree to indemnify and release Inspira from any and all loss, expense, damage, liability, and cost resulting from or arising out of my failure:(i) to furnish or instruct the production of the tax form; (ii) to arrange or direct the payment of the tax; and (iii) to furnish Inspira with the pertinent information necessary and appropriate for executing any directives I issue concerning the preparation, determination, and/or payment of such tax.

No Investment Advice: I acknowledge that Alts Custodian has not conducted any assessment or due diligence on my behalf regarding the directed investment action. Additionally, I recognize that I have not received any investment advice from Alts Custodian. Any documentation provided to Alts Custodian pertaining to the directed investment action is solely for the purpose of facilitating the transaction. Alts Custodian retains the right to decline custody of any asset. I do not anticipate or rely on Alts Custodian to safeguard me or my Account against fraud, inadequate investment performance, or investments that are unsuitable for me or my Account.

No Prohibited Transactions: I recognize that Alts Custodian has not assessed whether my investment is prohibited. I also understand that if my IRA participates in a prohibited transaction, it may result in taxable distribution and potential penalties. I affirm to the Custodian that I have sought guidance from my legal and accounting advisors to ensure my investment complies with all applicable federal and state laws, regulations, and requirements. This includes verifying that neither the offering entity nor any individual involved is disqualified under IRC 4975(e)(2).

Limited Power of Attorney: I hereby authorize and instruct Alts Custodian, at its discretion, to execute all documents required for any directed transaction. Additionally, for this specific purpose, Alts Custodian is empowered to make any necessary changes or corrections to any previously completed or executed documents that I have not yet submitted to the investment sponsor/issuer. If needed, this authorization acts as a limited power of attorney in favor of Alts Custodian.

Indemnification: I indemnify Alts Custodian from any loss, cost, liability, damage, or expense arising from executing the directed transaction and/or holding the investment in question as an asset of my Account. I confirm receipt, reading, and comprehension of all relevant Alts Custodian documents, including the Custodial Agreement and Disclosure Statements for my Account.

Arbitration: I consent to resolve any disputes or actions involving Alts Custodian through arbitration as outlined in the "Resolving Disputes and Binding Arbitration" section of the Custodial Agreement. I acknowledge that this means I waive my right to pursue legal action in a court of law.

ACCOUNT OWNER AUTHORIZATION

I certify that all information provided by me is correct and may be relied upon by the Custodian. I understand that I am responsible for determining eligibility requirements related to my account(s) and investments and if necessary have sought assistance from qualified legal, tax, or investment professionals.

Signature of Account Owner:

Account Owner Name: *(Print or Type)*

Date: *(MM/DD/YYYY)*