CompleteIRA Process Overview IRA 2.0
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So how does it all work? What happens; and who is involved? How do I know what is happening, and how do I know if things are moving along properly? What else do I have to do?

…All good questions: Here is an overview of the CompleteIRA process; and its timeline.

DAY 1-3

a) A completed and signed order form is turned into CompleteIRA's central office.
b) The information is entered into our secure, encrypted, systems.
c) The LLC application for the state is pulled. Initial documents prepared.
d) The custodial application is filled out. Transfer paperwork, if any, is identified.

DAY 3-7

e) The client is delivered a package of documents to review and sign. (LLC formation documents, operating agreement, custodial documents, agreement, and application).
f) The custodial agreement and application is filed.

DAY 5-14

g) The custodial account number is received.
h) Any rollover (if present) is instigated.
i) The LLC now has all the formation information needed, and is submitted for filing.

DAY 7-21

j) The LLC is now "of record" with the state.
k) The LLC's EIN number is obtained from the IRS.
l) Final, specialized, LLC paperwork is completed.
m) Interests are authorized to be released, and notice sent to the custodian.
n) Funding settles in the IRA account (an initial contribution or a rollover).

DAY 10-30

o) The custodian releases funds to the LLC in exchange for the authorized interests.
p) Time is scheduled for client to open the LLC's checking account (We'll have staff pre-call the bank and verify what should happen to avoid difficulties or delay).
q) The bank account is opened; the LLC's funding from the custodian is deposited.
r) Congratulations! You now have complete control of your investing future; as well as enhanced protection of your assets. Our system provides safety, speed, and control over your assets unmatched by any other retirement account program.

This level of control and freedom is most useful when you can turn to experts for help when you need it. That's why CompleteIRA staff, including our specialized self-directed retirement account legal counsel, are available to help answer questions you may have in the future. In 10 days or 10 years, we are here to help make your journey as safe and as successful as possible.

We are grateful to serve you. Make your future what you want it to be.

Some processes have very technical qualities; the exact methods and phrasing are very important. Each step is reviewed prior to fulfillment. To help make sure your assets can safely be controlled without running into IRS difficulties down the road, please utilize our skill and knowledge by talking to us prior to making new investments.