

Retirement Funds: Traditional IRA Roth Inherited SEP SIMPLE Solo(k)	
1. ☐	Submit your Completed Stadia Capital Group Application
2. ☐	Open Self-Directed Retirement Account - Stadia will initiate the application. - Please have your ID & beneficiary information readily available. - Agent Authorization – Please check this box to allow Stadia to assist with your account. No action is ever taken without your signature. - A credit card will be requested; however, Stadia will pay the setup fee and ongoing annual administration fees.
3. ☐	Fund Retirement Account (two methods) Transfer from IRA: - Liquidate to cash – investment amount, plus \$500. - Send current statement to Stadia Capital Group. - Review/Sign IRA Transfer Request once initiated by Stadia. Rollover from Qualified Plan: - Request a “Direct-Rollover” with your current plan administrator. They typically use their own form. Check must be payable to your Provident account (example: “<i>Provident Trust Group, LLC FBO: John Doe Roth IRA</i>”). See page 2 of the Deposit Submission Form for more info and mailing address. - Submit a Deposit Submission Form – Section 2, Option 2: enter approximate rollover amount in the <i>Contribution Amount</i> field and check the <i>Rollover</i> box. Also available through the Provident online portal under Electronic Forms.
4. ☐	Sign & Return Investment Documents – Stadia will forward documents via mail or DocuSign once the retirement account is funded.
5. ☐	Sign Direction of Investment with Preferred Custodian – Stadia will initiate.
6. ☐	Submit Accredited Investor Verification Documents (Due Within 90 Days) Stadia will forward the request for verification by email and USPS.

EMAIL & MAILING OPTIONS: admin@stadiacapitalgroup.com
P.O. BOX 4710, El Dorado Hills, CA 95762-9998
P.O. BOX 437260, Kamuela, HI 96743-7260