



## Transmittal Cover Letter Form Self Directed IRA (SDIRA)

To better serve you, this cover letter indicates the extent of the services and forms that will follow. (Email questions to [info@servicefinancial.com](mailto:info@servicefinancial.com).)

Date: \_\_\_\_\_ Your Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**\*\* REQUIRED \*\* Include your most recent account statement.**

### Method of Payment:

Credit Card Authorization with Number.

Card Type:  Visa  Mastercard  Discover

Card Number: \_\_\_\_\_ Expires: \_\_\_\_\_ Code: \_\_\_\_\_

Enclosed Check

Deduct from Transfer Amount

### How did you find us?

Commercial Capital Ltd.  Net Branch Name: \_\_\_\_\_

Internet  Direct Mail  Webinar  Other \_\_\_\_\_

Best phone number to reach you: \_\_\_\_\_

Email Address: \_\_\_\_\_