

Mountain West IRA Operations Team

ACCOUNT ESTABLISHMENT	Employee Name, Email, & Phone Number
> Answer general account opening questions > Assist in completing new account paperwork > Process account opening paperwork	Natasha Reams, Diana Hoff Accounts@MWIRA.com 208-314-2580

ACCOUNT FEES	Employee Name, Email, & Phone Number
> Fee invoice questions & payments > Fee payment method updates > Fee Schedule updates	Dylan Verbarendse, Shelly Smith AccountsReceivable@MWIRA.com 208-314-4018

ASSET MAINTENANCE	Employee Name, Email, & Phone Number
> Payment processing for IRA assets: • Property taxes, mortgages, vendor invoices, etc. > Payment Authorization Letter processing	Adriane Hull, Taryn McMinn, Kaden Kessel Maintenance@MWIRA.com 208-314-2750

ASSET PURCHASE OR SALE	Employee Name	Email & Phone Number
> Precious Metals & Foreign Currency • IRA approved coins & bullion; Dinar, Dong, etc.	Austin Leagjeld, Thomas Schuster, Raegan Rubio, Terri Liebenthal	Transactions@MWIRA.com 208-510-0859
> Private Placement & Private Stock • LLC, LP, JV, private stock, etc.	Austin Leagjeld, Thomas Schuster, Raegan Rubio, Terri Liebenthal	Transactions@MWIRA.com 208-510-0859
> Promissory Note • Secured, unsecured	Austin Leagjeld, Thomas Schuster, Raegan Rubio, Terri Liebenthal	Transactions@MWIRA.com 208-510-0859
> Real Estate (purchase/sale) • Rental property, raw land, etc.	Austin Leagjeld, Thomas Schuster, Raegan Rubio, Terri Liebenthal	Transactions@MWIRA.com 208-510-0859

ROLLOVERS/TRANSFERS	Employee Name	Email & Phone Number
> Incoming Rollover	Natasha Reams, Diana Hoff	Accounts@MWIRA.com 208-314-2580
> Incoming Transfer	Natasha Reams, Diana Hoff	Accounts@MWIRA.com 208-314-2580
> Outgoing Transfer	Angela Truex	Compliance@MWIRA.com 208-510-0881

MISCELLANEOUS	Employee Name	Email & Phone Number
1099-R/5498 Questions	Angela Truex	Compliance@MWIRA.com 208-510-0881
Contribution Check Processing	Adriane Hull, Taryn McMinn, Kaden Kessel	Maintenance@MWIRA.com 208-510-0881
Distributions	Angela Truex	Compliance@MWIRA.com 208-510-0881
Fair Market Valuations	Crystal Stoddard	Compliancemwi@MWIRA.com 208-639-7760
Income/Dividend Check Processing	Adriane Hull, Taryn McMinn, Kaden Kessel	Maintenance@MWIRA.com 208-510-0881
Note Payment Processing	Adriane Hull, Taryn McMinn, Kaden Kessel	Maintenance@MWIRA.com 208-510-0881
Online Access Support	Nelda Garcia, Natasha Reams	Reception@MWIRA.com 208-639-7761
Required Minimum Distributions	Angela Truex	Compliance@MWIRA.com 208-510-0881
Rental Income Processing	Adriane Hull, Taryn McMinn, Kaden Kessel	Maintenance@MWIRA.com 208-510-0881
Webinars & Events	Diana Hoff	Accounts@MWIRA.com 208-314-2580