

Mountain West IRA Operations Team

ACCOUNT ESTABLISHMENT	Employee Name, Email, & Phone Number
<ul style="list-style-type: none"> > Answer account opening questions > Assist with completing new account paperwork > Process account opening paperwork 	Austin Leagjeld, Diana Hoff Accounts@MWIRA.com 208-314-2580

ACCOUNT FEES	Employee Name, Email, & Phone Number
<ul style="list-style-type: none"> > Mountain West IRA fee invoice questions & payments > Fee payment method updates > Fee Schedule updates 	Dylan Verbarendse, Rozhel Cabayacruz AccountsReceivable@MWIRA.com 208-314-4018

ASSET PAYMENT / MAINTENANCE	Employee Name, Email, & Phone Number
<ul style="list-style-type: none"> > Payment processing for IRA asset expenses: <ul style="list-style-type: none"> • Depository storage fees, property taxes, mortgages, vendor invoices, etc. > Payment Authorization Letter processing 	Adriane Hull, Liliana Rettig, Harry Friedman Maintenance@MWIRA.com 208-314-2750

ASSET PURCHASE / SALE	Employee Name	Email & Phone Number
<ul style="list-style-type: none"> > Precious Metals & Foreign Currency <ul style="list-style-type: none"> • IRA approved coins & bullion; Dong, etc. 	Kaden Kessel, Allison Winkler, Raegan Rubio	Transactions@MWIRA.com 208-510-0859
<ul style="list-style-type: none"> > Private Placement & Private Stock <ul style="list-style-type: none"> • LLC, LP, JV, private stock, etc. 	Kaden Kessel, Allison Winkler, Raegan Rubio	Transactions@MWIRA.com 208-510-0859
<ul style="list-style-type: none"> > Promissory Note <ul style="list-style-type: none"> • Secured, unsecured 	Kaden Kessel, Allison Winkler, Raegan Rubio	Transactions@MWIRA.com 208-510-0859
<ul style="list-style-type: none"> > Real Estate (purchase/sale) <ul style="list-style-type: none"> • Rental property, raw land, etc. 	Kaden Kessel, Allison Winkler, Raegan Rubio	Transactions@MWIRA.com 208-510-0859

ROLLOVERS / TRANSFERS	Employee Name	Email & Phone Number
> Incoming Rollover	Austin Leagjeld, Diana Hoff	Accounts@MWIRA.com 208-314-2580
> Incoming Transfer	Austin Leagjeld, Diana Hoff	Accounts@MWIRA.com 208-314-2580
> Outgoing Transfer	Crystal Stoddard	Compliance@MWIRA.com 208-510-0881

MISCELLANEOUS	Employee Name	Email & Phone Number
1099-R / 5498 Questions	Crystal Stoddard	Compliance@MWIRA.com 208-510-0881
Contribution Check Processing	Liliana Rettig, Harry Friedman	Maintenance@MWIRA.com 208-314-2750
Distributions	Crystal Stoddard	Compliance@MWIRA.com 208-510-0881
Fair Market Valuations	Crystal Stoddard, Adonis Domanais	Valuations@MWIRA.com 208-510-0881
Income / Dividend Check Processing	Liliana Rettig, Harry Friedman	Maintenance@MWIRA.com 208-314-2750
Note Payment Processing	Liliana Rettig, Harry Friedman	Maintenance@MWIRA.com 208-314-2750
Online Access Support	Joana Lim	Reception@MWIRA.com 208-639-7761
Required Minimum Distributions	Crystal Stoddard	Compliance@MWIRA.com 208-510-0881
Rental Income Processing	Liliana Rettig, Harry Friedman	Maintenance@MWIRA.com 208-314-2750
Webinars & Marketing Events	Diana Hoff	Accounts@MWIRA.com 208-314-2580