



Your IRA. Your Asset Choices.

A simple process to open, fund, and direct your self-directed IRA.

*More Control.
More Possibilities.
Your Future.*

1



Choose an Account Type

Choose the self-directed retirement account that fits your goals — Traditional IRA, Roth IRA, SEP IRA, SIMPLE IRA, or Individual(k) Plan.

Eligibility and requirements vary by account type.

2



Open Your Account

Complete your account application and required documents. Our New Accounts Team is here to answer questions and assist you throughout the account-opening process.

3



Fund Your Account

Get your account ready for asset purchases through eligible contributions, transfers, or rollovers. Available funding methods depend on your account type and IRS requirements.

4



Research & Select an Asset

Explore eligible alternative assets and choose what to hold in your account. You are responsible for researching opportunities, evaluating risks, and conducting due diligence.

5



Direct the Asset Purchase

Submit your purchase instructions and required documentation. Mountain West IRA completes its administrative review and processes authorized transactions at your direction.

6



Your IRA Holds the Asset

Your IRA holds ownership of the asset. Income must return to the IRA, and asset-related expenses must be paid using IRA funds, subject to applicable IRS rules.

7



Ongoing Asset Administration

You direct ongoing asset activity while Mountain West IRA maintains account records, processes authorized transactions, and completes applicable IRS reporting — so you can stay focused on your goals.

Ready to Get Started?



CALL
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VISIT
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YOUR RETIREMENT.
YOUR WAY.

Mountain West IRA provides administrative and recordkeeping services and does not select, recommend, endorse, research, evaluate, or perform due diligence on assets or provide tax, legal, or financial advice.