MOUNTAIN WEST IRA

OPERATIONS TEAM

Client Department & Service Guide

A quick guide to which team can best assist you.

Account Opening & Funding

New account inquiries & setup, application processing, account funding options & incoming transfers or rollovers to new or existing accounts.

Accounts@MWIRA.com
208-314-2580

Asset Expenses, Contributions & Income

Asset expense payments (taxes, insurance, HOA, mortgage, etc.), Payment Authorization Letter (PAL) processing, ACH portal access, IRA contributions, asset income processing (rent, dividends, notes) & precious metals depository fees.

Maintenance@MWIRA.com
208-314-2750

Account Fees & Billing

MWIRA account fee payments & assistance, credit card updates, Fee Schedule questions, MWIRA fee invoices, account fee balances & billing inquiries.

AccountsReceivable@MWIRA.com
208-314-4018

Asset Purchases & Sales

Asset purchases & sales, additional funding for existing assets, registration & titling, precious metals & foreign currency transactions, private placements (LLCs, LPs, JVs), promissory notes & real estate transactions.

Transactions@MWIRA.com
208-510-0859

Distributions & Tax Reporting

Account closures, full & partial distributions, Required Minimum Distributions (RMDs) & IRA tax form questions (Forms 1099-R & 5498).

Compliance@MWIRA.com
208-510-0881

Outgoing Transfers & Rollovers

Full & partial outgoing account transfers to another custodian & rollovers to qualified retirement plans (401(k), 403(b), 457, etc.).

Compliance@MWIRA.com
208-510-0881

Other Account Services

Account updates (name, address, contact information, beneficiaries & authorized parties); online account access & login support.

Reception@MWIRA.com
208-639-7761

Valuations

Fair Market Valuation (FMV) processing and asset valuation questions.

Valuations@MWIRA.com
208-510-0881

Education & Resources

Webinars, educational events, and helpful resources for learning about self-directed IRAs SDIRAs.

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