

Account Fees

One-Time Set Up Fee

Annual Fee

	One-Time Set Up Fee	Annual Fee
Self-Directed IRA	\$0	\$495
Checkbook IRA Trust*	\$999	\$495
Checkbook IRA Multimember LLC**	\$1,250	\$495
Checkbook IRA Revocable Trust*	\$999	\$495
Checkbook IRA LLC Individual*	\$999	\$495
Solo 401(k)	\$999	\$399
ROBS	\$3,500	\$1,200
Crypto	\$0	\$100
Health Savings Account	\$0	\$120
Coverdell ESA	\$0	\$120
Stocks	\$0	\$100

* An additional \$299 annual IRA Compliance Shield applies to all Checkbook IRA accounts listed above beginning in year 2

** Starts at \$1,250 and increases \$250 per person

Included Services with all Accounts

Roth conversion / recharacterization	Overdraft forgiveness	Document research
Unlimited asset purchases	Statement correction	Deposit verification letters
Document notarization	Online statements/ invoices	Unlimited distributions / contributions

Activity Fees

These fees will be processed at the time of transaction.

Crypto liquidation and per-trade fee	1% per trade
Checkbook IRA Annual IRA Compliance Shield	\$299 per year
Expedited Processing - STANDARD (within 48 hours)	\$75 per transaction
Expedited Processing - PREMIUM (24 hours or less if possible)	\$200 per transaction
Account Termination Fee	\$250 per transaction
Outgoing - Domestic / International Wire	\$25 / \$45
Returned Item Fee	\$30 per occurrence
Delinquent Balance Fee Over 30 Days	\$25 per month
Required Minimum Cash Balance	\$500 per account
Multimember LLC Additional Members (2 included with setup cost).....	\$250 per member
Overnight Shipping Fee	\$75 per transaction
Stocks Commissions*	\$0 per trade

* No commissions on US exchange-listed stocks / ETFs. All other trades subject to IBKR Lite pricing.

Additional Solo 401(k) Activity Fees

Check Writing Fee	\$15 per transaction
Incoming Wires	\$15 per transaction

Premium Account Enhancements

Annual Report State Filing Service	\$99 + State Fee
LLC Amendment	\$600 - \$999*
LLC Dissolution	\$150 + State Fee
C-Corp Blocker Setup	\$600 - \$999
Additional LLC Formations	\$600 - \$999
Foreign Entity Registration	\$150 + State Fee
LLC Domestication	\$150 + State Fee*

* Pricing depends on state fees and desired setup