

**POTENTIAL MEMBER
REFERRAL FORM**

Existing RITA members are often called upon to transfer self-directed IRA assets to and from other custodians and third-party administrators. Each such transfer can be a potential lead for RITA membership. When called upon to transfer assets to or from a trust company, bank or third-party administrator that you recognize as not belonging to RITA, please fill out this form and send this it to Membership Director Mike Posey using his contact information below. Mike will contact your referral about the benefits of RITA Membership. It is not necessary for you to refer investment product sponsors, large brokerage firms or mutual fund companies to Mike as they are unlikely to be a fit for RITA membership.

PROSPECTIVE REGULAR MEMBER/SERVICE MEMBER INFORMATION	
Company Name:	Contact Name:
Physical Address:	Website Address:
Phone:	Email:
Type of Company: <input type="checkbox"/> Trust company or bank <input type="checkbox"/> Third party administrator (TPA) <input type="checkbox"/> Other: (specify: _____)	

PROSPECTIVE REGULAR MEMBER/SERVICE MEMBER INFORMATION	
Company Name:	Contact Name:
Physical Address:	Website Address:
Phone:	Email:
Type of Company: <input type="checkbox"/> Trust company or bank <input type="checkbox"/> Third party administrator (TPA) <input type="checkbox"/> Other: (specify: _____)	

NOTES/COMMENTS	
Signature:	
Date:	RITA Member Firm:
Referring Employee Signature:	Printed Name: