

The role of NuView IRA, Inc. as administrator providing custody of self-directed accounts is nondiscretionary and/or administrative in nature. The Accountholder or his/her authorized representative must direct all investment transactions and choose the investment(s) for the account. NuView IRA has no responsibility or involvement in selecting or evaluating any investment. It neither endorses nor recommends investment in any asset and does not provide any legal, tax, investment or any other advice with respect to any investment and Issuer agrees to make no representation to the contrary. Issuer further acknowledges that NuView IRA's acceptance of an asset indicates only that the asset meets the requirements of NuView IRA's existing system and procedures and in no way can be construed to be either an endorsement or evaluation of merit or an acknowledgement that the asset has been approved by any regulatory or supervisory body. NuView IRA collects the information below solely for administrative review purposes.

## 1 ASSET DETAILS

<b>Asset Name</b>		<b>Share Class</b> <i>(If applicable)</i>	
<b>Current Value per Unit/Share</b>	<b>Date Current Value Determined</b>	<b>Asset Type:</b>	
<b>Unitized</b> <input type="checkbox"/> Yes <i>(If "Yes", specify value)</i> _____ <input type="checkbox"/> No <i>(If "No", asset will be held @ \$1.00/unit)</i>		<input type="checkbox"/> Debt Offering <input type="checkbox"/> Real Estate Investment Trust <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Other <input type="checkbox"/> Private Stock <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Convertible Note	
<b>Organized in the State of</b>		<b>Interest Rate</b> <i>(If applicable)</i>	<b>Maturity</b> <i>(If applicable)</i>
<b>Fund expected closing date</b> <i>(If applicable)</i>		<b>Is the original subscription document required to be mailed for each investor?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	

## 2 ISSUER OR INVESTMENT COMPANY CONTACT

The individual responsible as a general contact of the "Issuer" for NuView IRA:

<b>Issuing Company</b>		
<b>Name</b>	<b>Address</b>	
<b>City</b>	<b>State</b>	<b>Zip Code</b>
<b>Phone</b>	<b>Fax</b>	<b>Email Address</b>

## 3 PRICING CONTACT Can the valuation for this asset be obtained through DST? YES NO

The individual responsible for providing the annual fair market value and substantiation of value to NuView IRA:

<b>Name</b>	<b>Address</b>	
<b>City</b>	<b>State</b>	<b>Zip Code</b>
<b>Phone</b>	<b>Fax</b>	<b>Email Address</b>

## 4 TRANSFER/SELL CONTACT

The individual responsible for making re-registration changes and/or liquidating\* the asset upon request from NuView IRA:

<b>Name</b>	<b>Address</b>	
<b>City</b>	<b>State</b>	<b>Zip Code</b>
<b>Phone</b>	<b>Fax</b>	<b>Email Address</b>

\*Pursuant to the terms of the offering.

**5 DOCUMENTS REQUIRED TO REVIEW A NON-PUBLIC ASSET**

<b>Private Stock</b> - Articles of Incorporation - Operating Agreement - Corporate Resolution - Subscription Documents - Physical Certificate	<b>Real Estate Investment Trust (REIT)</b> - Articles of Organization - Prospectus or Memorandum - Subscription Documents - Sample Copy of a Confirmation	<b>Limited Partnership or Limited Liability Company</b> - Articles of Organization or Certificate of Formation - Prospectus or Memorandum - Partnership Agreement or Operating Agreement - Corporate Resolution, Subscription Documents - Sample Copy of a Confirmation
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**6 FUNDING INSTRUCTIONS** *Send funds for distribution via:*  ACH  WIRE  CHECK  TO BE PROVIDED

For ACH/WIRE - Please complete the info below		For CHECK - Please complete the info below
<b>Bank Name</b>		<b>Make Check Payable To</b>
<b>Bank Phone</b>	<b>ABA Routing Number</b>	<b>Mail Check To</b>
<b>Account Holder Name</b>	<b>Account Number</b>	<b>Address</b>
<b>For Credit To</b>		<b>City, State, Zip</b>
		<b>Send Check via:</b> <input type="checkbox"/> Regular Mail <input type="checkbox"/> Overnight Mail (\$30) <input type="checkbox"/> Wire (\$30) <input type="checkbox"/> Certified Check (\$10 + Overnight Mail Fee) <input type="checkbox"/> Hold for pickup
<b>Will this investment accept non-qualified funds (non-retirement)?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		

**7 HOW ARE IRA ADMINISTRATIVE FEES GOING TO BE PAID? (Select One)**

<input type="checkbox"/> <b>Each IRA investor will be responsible for their own fees</b>	<input type="checkbox"/> <b>The investment sponsor will pay fees on behalf of each IRA*</b> ▶ <b>Fee payment duration</b> (select one): <input type="checkbox"/> First Year Only <input type="checkbox"/> As long as the client is an investor within our offering
*Investment sponsor will need to complete a separate Investment Sponsor Fee Disclosure	

**8 ACKNOWLEDGEMENT**

- Upon purchase of the asset being funded or its re-registration, Issuer will provide NuView IRA, Inc. with proof of ownership of said asset within 60 days of receipt of purchase funds or request for re-registration. Proof of ownership may be in the form of an original stock certificate, executed subscription documents or by other means acceptable to NuView IRA. Issuer further acknowledges that failure to do so may cause NuView IRA to distribute the asset which may result in a taxable event to the accountholder.
- The ownership interest and/or certificates will be correctly registered as follows:  
 NuView IRA, Inc., Custodian  
 FBO (Accountholder Name, Type of Account, Account Number)  
 280 S. Ronald Reagan Blvd., Suite 200  
 Longwood, FL 32750  
 Tax ID #: 27-0063496
- Accountholders will be provided offering documentation including but not limited to private placement memoranda, prospectuses, operating agreements, and subscription agreements as appropriate for the investment in the asset.
- If applicable, Issuer will inform accountholders that the investment may generate unrelated business taxable income (UBTI). If UBTI is generated, Issuer represents that UBTI information will be included on IRS form 1065 (Schedule K-1) and be provided to account holders each year.
- Issuer will not use NuView IRA's name in advertising, printed or web-based material or any other form of communication without its express written consent.

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**8 ACKNOWLEDGEMENT** *(continued from page 2)*

- Issuer will indemnify and hold NuView IRA harmless from and against any and all damages, claims, losses, expenses or costs of any nature (including without limitation any court costs and attorney's fees) asserted against or incurred by NuView IRA as a result of legal actions involving the investment or the asset to the extent attributable to the fraud, negligence, or misconduct of the Issuer.
- All income related to the asset or associated with the investment will be sent directly to NuView IRA in accordance with the Asset Payment Instructions on page 3 in a timely manner for credit to the appropriate NuView IRA account. Under no circumstances will the Issuer distribute any monies or assets directly to an NuView IRA accountholder prior to an in-kind distribution of the asset to the accountholder. Issuer is solely responsible for any tax, legal, or penalty damages and charges associated with the direct distribution of any monies or assets by the Issuer to the accountholder.
- Issuer understands that accountholders may need to re-register or sell part of the asset to meet required minimum distribution rules. Issuer certifies that the asset is structured to permit such distributions, subject to the terms of the private placement memorandum.
- Issuer will not accept any subscription document, change or registration request, or change of registered owner address, including dividend payment address, for any asset that lists NuView IRA as custodian but does not bear an authorized signature of NuView IRA and agrees to notify NuView IRA immediately upon receipt of any such documents.
- Issuer understands that the investment company's inability to price the asset annually, provide substantiation of value, provide investment confirmations or send distributions directly to NuView IRA may make the asset no longer administratively feasible for NuView IRA to custody. In this event, Issuer agrees that upon direction from NuView IRA the asset will be reregistered to either the accountholder or to another custodian.
- Investment sponsor confirms the above referenced asset does not include any illegal or impermissible investments under South Dakota or Federal law, including, but not limited to, holdings of marijuana or other illegal substances, illegal gambling, or illegal artifacts.

**9 CUSTODIAL AGREEMENT FOR AGENCY ACCOUNTS**

**Custodian will provide ministerial custodial services and therefore WILL NOT provide any tax forms to the ACCOUNT OWNER or the IRS. The ACCOUNT OWNER and/or responsible party (who may be the ACCOUNT OWNER's Representative) will be responsible to obtain tax reporting documents directly from investment sponsors/managers with whom the Account holds an investment interest ("Investment Sponsor"). Custodian will furnish ACCOUNT OWNERS an/or Representatives annually with a statement regarding all the transactions and activities executed under this Agreement. ACCOUNT OWNER is responsible for the preparation and filing of any tax returns associated with the Account.**

Initial Here \_\_\_\_\_

\*Only if sold through an advisor/RIA.

**10 SIGNATURE**

**I, the General Partner, Managing Member, Corporate Officer or other authorized individual of the above named Issuer hereby agree to the above terms, conditions and representations on behalf of the Issuer and the investment company.**

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

### FED WIRE AND ACH

**Bank**

Cogent Bank  
1113 Saxon Blvd  
Orange City, FL 32763  
Routing Number (ABA) : 063114661

**Beneficiary**

NuView IRA  
Account Number : 8100000944  
For Final Credit: [Client Name] & [Client IRA Account Number]

### CHECKS

**Make Payable to:**

NuView IRA FBO [Client Name]  
See BBI section below for Memo Line details

**Send to:**

280 S. Ronald Reagan Blvd., Suite 200  
Longwood, FL 32750

### PHYSICAL DOCUMENTS

Forward Certificates, Registration Papers (deeds, mortgages, notes, assignments, etc.), and Corporation documents (copies of partnership agreements, operating agreements, subscription agreements, etc.) along with assignment or power documents to:

NuView IRA, Inc.  
280 S. Ronald Reagan Blvd., Suite 200  
Longwood, FL 32750

### ASSET TITLING

**Please title all physical assets as:** NuView Trust Co Custodian FBO [Client Name] IRA # [Account Number]

### REFERENCE

**For Bank to Bank (BBI):**

For reference purposes and to ensure that deposits are booked correctly, please label the BBI section of the **Fed Wire** or **Memo Line** of the check as follows:

If the deposit is for a/an...	Please label with...
IRA to IRA transfer	"IRA to IRA Transfer"
Direct Rollover	"Direct Rollover Contribution"
Indirect Rollover	"Indirect Rollover Contribution"
IRA Contribution	"Contribution" and the tax year for the contribution
Real Estate-Related Deposit	[Address of the property]
Mortgage-Related Deposit	[Address of the property that secures the loan]
Unsecured Note Payment	[Name of borrower as listed on the note]
Brokerage-Related Deposit	[Brokerage firm and delivering account number]
Earnings related to any other investment	"Earnings from" and the name of the investment