

GOLD IRA SETUP CHECKLIST

Use this checklist to move step by step through the Gold IRA setup process.

1 DEFINE YOUR STRATEGY

- ☐ Decide whether you want a Traditional or Roth Gold IRA
- ☐ Determine your target allocation
- ☐ Decide whether you are rolling over funds or making new contributions

2 CHOOSE A SELF-DIRECTED IRA CUSTODIAN

- ☐ Confirm the custodian specializes in precious metals IRAs
- ☐ Review fees
- ☐ Select your custodian

3 OPEN YOUR ACCOUNT

- ☐ Complete custodian application
- ☐ Designate beneficiaries
- ☐ Receive account approval

4 FUND YOUR GOLD IRA

If rolling over funds:

- ☐ Request direct rollover
- ☐ Confirm funds are transferred to new custodian

If making new contributions:

- ☐ Confirm annual contribution limit
- ☐ Submit contribution

5 SELECT IRS APPROVED METALS

- ☐ Work with a reputable precious metals company
- ☐ Choose metal type: gold, silver, platinum, or palladium
- ☐ Confirm metals meet IRS purity requirements
- ☐ Select approved coins or bars

6**PURCHASE METALS**

- ☐ ☐ Authorize purchase through custodian
- ☐ ☐ Confirm metals are purchased within your IRA

7**ARRANGE STORAGE**

- ☐ Confirm metals are stored in an IRS-approved depository

8**MONITOR ACCOUNT**

- ☐ Review holdings annually

9**PLAN FOR DISTRIBUTIONS**

- ☐ Understand required minimum distribution rules, if applicable
- ☐ Decide whether you will take metals in kind or sell for cash
- ☐ Review potential tax implications before taking distributions



ABOUT SWISS AMERICA

Swiss America was founded in 1982 and built a reputation as one of the most trusted precious metals firms in the country. Over the past 40 years, we've guided more than 70000 clients on using gold and silver to diversify their portfolios.

The company is well-known for its personalized approach, professional support, and commitment to investor education.

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