

INVESTING WITH IROQUOIS VALLEY THROUGH A TAX-DEFERRED ACCOUNT (401(K) or IRA)

Many Iroquois Valley investors choose to invest through tax-deferred accounts like IRAs and 401(k)s, given the long-term nature of farmland investing. Below is a list of third-party custodians that have been used by investors. This list is provided for your convenience and does not represent an endorsement or recommendation. Custodian fees and policies may change—please contact the provider directly for the most current information.

CUSTODIAN	APPLICATION FEE	ANNUAL FEE	TRANSACTION FEE	ADDITIONAL INFORMATION	CONTACT INFORMATION	WEBSITE
Charles Schwab & Co.	Please inquire	\$250+	Please inquire	Available Here	alternativeinvestmentdept@schwab.com	https://www.schwab.com/
Fidelity (NFS)	\$50	\$250+	Please inquire	Available Here	NFSAltInvTransaction@fmr.com	https://www.fidelity.com/
Pershing	Please inquire	Please inquire	Please inquire	Available Here	aidepartment@pershing.com	https://www.bny.com/pershing/us/en.html
Alto IRA	None	\$100-400	\$75	Available Here	https://www.altoira.com/contact	https://www.altoira.com/
Community National Bank	\$50	\$125	\$15	Available Here	irainfo@cnbcustody.com	https://www.cnbcustody.com/
Equity Trust	\$50-75	\$225+	None	Available Here	NewAccountsETC@trustetc.com	https://www.trustetc.com/
Forge Trust	\$0-50	\$340	\$50	Available Here	https://forgetrust.com/contact-us/	https://forgetrust.com/
GoldStar Trust	\$50	\$150	None	Available Here	https://www.goldstartrust.com/contact/	https://www.goldstartrust.com/
Inspira Financial	None	\$175+	None	Available Here	alternatives@inspirafinancial.com	https://inspirafinancial.com/
IRA Resources	\$100	\$200+	\$50+	Available Here	forms@iraresources.com	https://www.iraresources.com/
MidAtlantic IRA	\$50	\$200+	\$125	Available Here	https://www.midatlanticira.com/contactus/	https://www.midatlanticira.com/
New Direction	\$30	\$390+	\$95	Available Here	https://ndtco.com/contact-us/	https://ndtco.com/
Provident Trust	\$50+	\$395+	None	Available Here	info@trustprovident.com	https://trustprovident.com/
STRATA Trust	\$50	\$400+	\$50	Available Here	NewInvestments@stratatrust.com	https://www.stratatrust.com/