

Formerly known as First Trust Company of Onaga

Trust Reporter Log In (<https://backup.trustreporter.com/TRv4/?bankabvr=ONAGA>)

Open New Account (<https://www.mainstartrust.com/Log-in-Sign-Up>)



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4 Easy Steps To Open Your Self-Directed IRA

ACCOUNT SET-UP ACTION ITEMS:

STEP 1. Open the Account

THERE ARE TWO WAYS TO COMPLETE THE IRA APPLICATION.

1. Printed form: Go to the Forms page (<https://www.mainstartrust.com/forms>), choose the applicable account type and then open IRA Application and Agreement. Complete/print the forms to send to Mainstar.
2. Online Setup: Click on the green Open New Account button (<https://www.mainstartrust.com/Log-in-Sign-Up>) in the upper right corner of the website. Answer the questions as prompted to complete the application.

STEP 2. Fund the Account

IF YOUR NEW MAINSTAR IRA WILL BE FUNDED THROUGH A TRANSFER FROM ANOTHER IRA:

- Complete the Transfer/Direct Rollover form found here (<https://www.mainstartrust.com/upload/files/2017/06/transfer-direct-rollover-requestpdf1497293831.pdf>). Mainstar Trust will send

1-800-521-9897

Questions?

Contact Mainstar Trust ([/Contact](#))
FAQs ([/Faq](#))

Getting Started

Self-Directed IRA ([/self-directed-ira](#))
Account Options ([/account-options](#))
Asset Types ([/asset-types](#))
New Account Application ([/Log-in-Sign-Up](#))

Resources

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this form to your current custodian to begin the transfer of money or assets to your Mainstar Trust IRA.

- Make sure to include a copy of a recent statement from your current custodian.

IF YOUR NEW MAINSTAR IRA WILL BE FUNDED THROUGH A ROLLOVER FROM A RETIREMENT PLAN:

- Complete the Transfer/Direct Rollover form found here (<https://www.mainstartrust.com/upload/files/2017/06/transfer-direct-rollover-requestpdf1497293831.pdf>). Mainstar Trust will send this form to your current plan administrator to begin the rollover process to your Mainstar Trust IRA.
- Contact your employer or current retirement plan administrator to see if the plan requires its own forms to be used to complete the Rollover.

IF YOUR NEW MAINSTAR IRA WILL BE FUNDED THROUGH NEW CONTRIBUTIONS:

- Complete the contribution section on the application and write the contribution year on the check sent to Mainstar.
- Personal checks may take 5 business days from the date of deposit to clear your bank.

STEP 3. Select an Investment / Make a Purchase

- Purchase paperwork does not have to be included with the account opening or transfer/rollover documents. However, many accountholders submit all of the paperwork when opening the account to expedite the purchase process.
- Complete the Issuer Subscription documents, if required by the issuer/asset company. Mainstar Trust will fill out the registration section and sign the subscription documents prior to submitting the final purchase.
- Complete the Mainstar Trust Purchase Authorization found here (<https://www.mainstartrust.com/upload/files/2015/12/purchase-authorizationpdf1450812608.pdf>).

If you are not ready to make an investment when you open your Mainstar Trust account, you can submit purchase documentation at any time.

STEP 4. Send Documents to Mainstar Trust

- Be sure all forms are signed where/if required!
- Documents can be delivered to Mainstar by one of the following:
 - Mail to Mainstar Trust, 214 W. 9th St, Onaga, KS 66521
 - Email to customerservice@mainstartrust.com
(mailto:customerservice@mainstartrust.com)
 - Fax to 913-901-4190

Accountholder FYI

Investment Review

Mainstar Trust encourages you to review all investment products for appropriateness with your financial advisor, accountant or legal counsel. Mainstar Trust is a self-directed IRA Custodian and does not provide investment, tax or legal advice. By providing custody services, Mainstar Trust is not making any judgment as to the quality or suitability of any investment.

Account Funding Process Between Mainstar and Previous Custodian/Administrator

Once Mainstar Trust has received all of the documentation in good order, we will work with your current custodian/administrator to move the monies and/or assets to Mainstar Trust

- Custodian to custodian transfers typically take 1-3 weeks to complete.
- Rollovers from a qualified plan typically take 2-4 weeks based upon employer requirements.

7 Day Revocation

Please note: Per the IRS, an IRA accountholder may revoke an IRA within 7 days after the IRA is established. When the IRA accountholder chooses to revoke the IRA, the full amount contributed to the IRA must be returned

to the accountholder. As a result of this rule, and due to the limited market for some investments, purchases cannot be fully executed until the 7-day period is up.

Accountholder Fees

Mainstar Trust does not charge a market value fee. Your fees do not go up as your account grows. Mainstar's competitive fee structure is activity based. The Fee Disclosure can be found here (<https://www.mainstartrust.com/upload/files/2017/04/fee-disclosure-4-2017pdf1491405385.pdf>).



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Company

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Account Holders