



**FOSS MOUNTAIN CAPITAL**

Managed Futures & Foreign Exchange

## IRA Account Opening Instructions

To open an individual retirement account (IRA), SEP or 401k account, clients must first open a “self-directed” retirement account with a custodian that accepts “non-traditional” investments.

There are a number of trust companies that provide the necessary administrative, custodial and reporting services required for a “self-directed” account to invest in a Futures “IRA” account. Foss Mountain Capital, LLC provides an introduction to Millennium Trust Company, LLC as a courtesy. Clients may work with the trust company of their choice as the process for establishing a “self-directed” retirement account is fairly standard.

Please review Millennium Trust’s account opening documents titled “IRA/SEP/401k Complete Set”. Foss Mountain Capital, LLC or Millennium Trust LLC will assist you with completing the applicable documents.

Please send completed paperwork to:

Millennium Trust, LLC  
Attn: Futures Department  
Suite 420  
820 Jorie Blvd.  
Oakbrook, IL 60523

To follow up on your paperwork please contact Millennium Trust, LLC directly at: 800-932-0053 or at [www.mtrustcompany.com](http://www.mtrustcompany.com).

Clients must first fund their futures account at Millennium Trust, LLC. Millennium will in-turn fund your futures account with Foss Mountain Capital, LLC.

Millennium charges \$150.00/year to perform the trust function for your account and places a mandatory 7 day waiting period on all new accounts. Please review their website for a complete listing of their fee schedule, account policies and corporate background.