ABOUT MIDLAND

Midland is a leading custodial services provider in the United States focused on self-directed IRA accounts, 1031 exchanges, and private fund custody services. In business since 1994, Midland prides itself on being the most responsive company in its industry by providing personal service representatives to each client and driving efficient operations across the firm.

KEY QUESTIONS TO ASK

1. Are you investing funds from your retirement account (IRA)? Do you have an IRA?
2. Did you know that IRAs offer tax-deferred or tax-free growth of your investments?
3. Did you know you can trade with both personal and IRA funds?
4. Are you interested in diversifying your investments to lower your risk?

PROCESS

1 Open Edge Clear Account

Broker Sends Client:

- Edge Clear App
- Letter of Direction
- CTA Disclosure Docs
- Any Additional Docs

2 Open Midland Account

Midland Sends Client:

- Application (Valid ID Req.)
- Fee Disclosure
- Transfer Form (Existing IRA) *Or*
- Rollover Form (Old 401(k))

3 Account Completion

Midland Finalizes Account:

- Executes FCM Acct Agrmt
- Receives FCM Acct #
- Sends IRA Funds to FCM

OFFER

Midland is offering to waive your account set up fee when investing with Edge Clear.
*Use promo code **EDGECLEAR**.*
Contact us today to redeem this offer.

Call today to learn more!

www.midlandtrust.com | 239.333.1031