



Investment Team Checklist

- Attorney**
Name: _____
Phone/Email: _____
- Accountant/Tax Advisor**
Name: _____
Phone/Email: _____
- Self-Directed IRA Representative**
Name: _____
Phone/Email: _____
- Loan Officer/Mortgage Broker**
Name: _____
Phone/Email: _____
- Appraiser**
Name: _____
Phone/Email: _____
- Inspector**
Name: _____
Phone/Email: _____
- Title Officer/Company**
Name: _____
Phone/Email: _____
- Insurance Representative**
Name: _____
Phone/Email: _____
- Contractor**
Name: _____
Phone/Email: _____
- Handyman**
Name: _____
Phone/Email: _____
- Property Manager**
Name: _____
Phone/Email: _____
- Cleaning Service**
Name: _____
Phone/Email: _____
- Landscaping/Lawn Service Company**
Name: _____
Phone/Email: _____

Checklist 1 Investment Team