

VOUCHER

Advanta IRA Client Referral Program

*This voucher must be included with the new application**

Advanta IRA
Self-Directed Retirement Plans

\$10 off application fee: _____ (new account applicant)

\$50 off future annual fee: _____ (referred by/existing client)

New account applicant's signature: _____

*This voucher is only valid if sent with the new account application. Not valid in combination with other offers and cannot go towards past due fees.

Advanta IRA Client Referral Program

Want a free self-directed IRA? Here's your chance to offset administrative fees and get exactly that!

We appreciate our current clients and realize you are our best source for new clients. You can raise awareness about the potential of self-directed accounts by letting fellow investors know Advanta IRA is your preferred administrator. Use this referral voucher to give to interested parties and receive \$50 off your administration fees the year following the date they become our client. New clients can present this voucher to receive \$10 off their application fee as thanks for choosing Advanta IRA to administrate their accounts.

Refer enough new clients and you can earn voucher credit to pay for your IRA administration fees the following year!

How it works.

Print it out and fill your name in the space provided for existing client. Fill in the name of the person you give the voucher to. If your referral decides to become a client of Advanta IRA, he or she must submit the voucher at the time they submit their application. Vouchers presented after the fact will not be accepted.

What happens next?

- Advanta IRA will contact you to thank you and let you know your referral became a client.
- Existing clients receive a \$50 credit towards future administrative fees in the year following the date their referral becomes a client of Advanta IRA.
- New clients referred by an existing client receive \$10 off the new account application fee.

Of special note:

- Voucher will not be converted as a cash rebate and can only be applied to future fees (existing clients) or as a discount on a new application fee (new clients).
- The client referral coupon must be filled out in its entirety.
- The voucher must be submitted at the same time the new account forms are submitted. Vouchers presented after the fact are not accepted.
- \$50 credit to existing clients only applies to future fees, not previous invoices or past due fees. \$10 credit can only be applied to the new application fees.
- This promotion is not valid for existing clients opening a second account. New client is defined as an individual (or entity) who has never been a client of Advanta IRA in the past.
- The referral voucher is not valid in conjunction with other offers.
- Offer expires August 31, 2013.