

Titan Summer Rollover Award: Terms & Conditions

Offer applies to all IRA, 401(k), and 403(b) rollovers invested into a Titan IRA from August 24, 2021 through September 20, 2021. Payment for eligible rollover transfers will be made after one year has passed since the rollover transfer was invested (“Payment Date”).

Your participation in Titan’s Summer Rollover Award is subject to the following terms and conditions:

Through the Titan Summer Rollover Award program, you have the opportunity to earn a promotional credit (“Titan Award”) based on the “Rollover Value” as illustrated below:

Illustrative Titan Summer Rollover Awards

Rollover Value	Titan Award
\$5,000 - \$9,999.99	\$25
\$10,000 - \$19,999.99	\$75
\$20,000 - \$49,999.99	\$150
\$50,000 - \$99,999.99	\$300
\$100,000 - \$249,999.99	\$500
\$250,000 - \$499,999.99	\$750
\$500,000 - \$999,999.99	\$1,500
\$1,000,000 - \$1,999,999.99	\$3,500
\$2,000,000 +	\$6,000

The Rollover Value is determined as the value of a rollover transfer invested in a Titan IRA from August 24, 2021 through September 20, 2021. This offer is only valid if the full Rollover Value is invested and remains in a Titan IRA until the Payment Date.

The Rollover Value of multiple rollover transfers may be summed to reach the highest eligible Titan Award tier; in this case, the Payment Date will be after one year has passed since the most recent of the combined rollover transfers was invested.

The Titan Award will be deposited directly into the Titan IRA into which the Rollover Value was originally invested. The Titan Award will be considered a regular IRA contribution for the calendar year during which the Titan Award is deposited into the Titan IRA, and is subject to standard IRA contribution limits per IRS rules. It is the sole responsibility of the client to ensure that the Titan Award and all other IRA contributions do not exceed the client’s IRA contribution limits per IRS rules.

If you have existing referral credits that result in fee reductions of 0.25% increments, the Titan Award will be reduced by the same percentage as your advisory fee has been reduced, as illustrated in the following chart:

Illustrative Titan Summer Rollover Award Adjusted for Referral Credits

Rollover Value	Titan Award: User with 1 Referral Credit	Titan Award: User with 2 Referral Credits	Titan Award: User with 3 Referral Credits	Titan Award: User with 4+ Referral Credits
\$5,000 - \$9,999.99	\$19	\$13	\$6	\$0
\$10,000 - \$19,999.99	\$56	\$38	\$19	\$0
\$20,000 - \$49,999.99	\$113	\$75	\$38	\$0
\$50,000 - \$99,999.99	\$225	\$150	\$75	\$0
\$100,000 - \$249,999.99	\$375	\$250	\$125	\$0
\$250,000 - \$499,999.99	\$563	\$375	\$188	\$0
\$500,000 - \$999,999.99	\$1,125	\$750	\$375	\$0
\$1,000,000 - \$1,999,999.99	\$2,625	\$1,750	\$875	\$0
\$2,000,000 +	\$4,500	\$3,000	\$1,500	\$0

This promotion is not valid with any other offers and is non-transferrable. Offer available to U.S. Residents only. Titan reserves the right to terminate this offer at any time, to limit the amount of account bonuses you are eligible to receive, and to refuse or recover any promotion award if Titan determines that it was obtained under wrongful or fraudulent circumstances, that inaccurate or incomplete information was provided, or that any terms of the Titan Terms of Use or Account Agreement have been violated.

You agree that you are making a fully-informed and independent determination to roll-over the IRA and are aware of the risks of a Titan-managed IRA, including the risk of loss of principal, as described in our Account Agreement. The information contained herein is not, and should not be construed as, an offer to sell or the solicitation of an offer to buy any securities. In addition, nothing contained herein is intended to be, nor shall it be construed as, investment advice, nor is it to be relied upon in making any investment or other decision.

If you cannot accurately make the preceding representations, you may not participate in the Titan Summer Rollover Award. If you are currently participating in the Titan Summer Rollover Award and the preceding representations become inaccurate, you agree to immediately inform Titan at support@titan.com.