

Titan IRA Rollover Award: Terms & Conditions

Offer applies to all IRA transfers, 401(k) rollovers, and 403(b) rollovers initiated into a Titan IRA between October 9th, 2019 and October 31st, 2019. Payments for eligible transfers will be made on November 1st, 2020.

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

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

Illustrative Titan IRA Rollover Awards

Rollover Value	Titan Award
\$25,000 - \$50,000	\$200
\$50,001 - \$100,000	\$350
\$100,001 - \$250,000	\$750
\$250,001 - \$500,000	\$1,500
\$500,001 - \$750,000	\$3,000
\$750,001 - \$1,000,000	\$4,500
\$1,000,001 +	\$6,000

The Rollover Value is determined as the net value of all rollover transfers made to a Titan IRA during the promotion dates. This offer is only valid if the full Rollover Value remains in a Titan IRA for the next 12 month period [November 1, 2019 to November 1, 2020].

The Titan Award will be deposited directly into the Titan IRA into which the Rollover Value was originally deposited. The Titan Award will be considered a regular IRA contribution for the 2020 calendar year 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 IRA 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
\$25,000 - \$50,000	\$150	\$100	\$50	\$0
\$50,001 - \$100,000	\$263	\$175	\$88	\$0
\$100,001 - \$250,000	\$563	\$375	\$188	\$0
\$250,001 - \$500,000	\$1,125	\$750	\$375	\$0
\$500,001 - \$750,000	\$2,250	\$1,500	\$750	\$0
\$750,001 - \$1,000,000	\$3,375	\$2,250	\$1,125	\$0
\$1,000,001 +	\$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 IRA Transfer Award. If you are currently participating in the Titan IRA Rollover Award and the preceding representations become inaccurate, you agree to immediately inform Titan at support@titanvest.com.