

POTTS FINANCIAL SERVICES

POTTS FINANCIAL SERVICES AGREEMENT

(Please retain this page for your records)

In order for us to proceed, this agreement needs to be read and Step One completed. For Potts Financial Services to help you and your spouse understand why and how you should use your IRA or 401(k) rollover account to purchase real estate, we must follow the outlined process.

STEP ONE

Alan Potts will conduct a private meeting or telephone conference call with you. This meeting is an opportunity for you and your spouse to learn the two different ways an IRA can be used to purchase real estate. The real estate can be purchased inside and owned by your IRA or the real estate can be purchased outside your IRA and owned outright. If we feel a IRA / Real Estate transaction is possible, continue to STEP 2.

STEP TWO

This step is devoted to your personal Real Estate / IRA transaction. To help us design your plan, we will provide you the following:

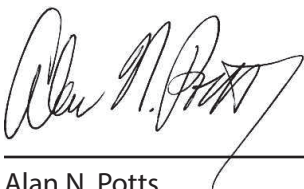
- Our Real Estate / IRA Questionnaire
- Real Estate / IRA Agreement

When the signed Questionnaire, page 2 of the Real Estate /IRA Agreement and your plan statement(s) are received, we will provide the consultative/design services for your IRA / Real Estate transaction. Without these documents, we cannot proceed.

STEP THREE

Provide an outline of our findings and any forms necessary to begin the IRA transfer process. Our services include step by step assistance before, during and after the IRA / Real Estate purchase.

We look forward to working with you and hope the opportunity presents itself.



Alan N. Potts

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CLIENT AGREEMENT

Please sign and return this page with Questionnaire

STEP ONE

Conduct a conference call so you and your spouse can learn the two different ways an IRA / 401(k) rollover account can purchase real estate. After our meeting, if we feel a IRA / Real Estate transaction is a viable alternative continue to STEP 2.

STEP TWO

Complete, sign and return the Real Estate / IRA Questionnaire, this page of the Agreement and recent IRA / 401(k) rollover account statement(s). Without these documents, we cannot proceed.

When the above documents are returned, provide us any consultative information that will assist in the design of your IRA / Real Estate transaction.

STEP THREE

When your program is agreed upon, complete the new IRA account paperwork. Once the new IRA is funded, finalize the plan structure and begin the implementation process.

Dated this _____ day of _____, 20 ____.

Client Signature: _____ Print Name: _____

Spouse Signature: _____ Print Name: _____

Potts Financial Services
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