

# Assets First® Info Request

\*Required Information.

\*Name: \_\_\_\_\_

Physical street address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

\*Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

\*Email: \_\_\_\_\_

\*Please indicate best time to contact you and time zone: \_\_\_\_\_

\*Address of property or name of realtor / agency where you saw this web site:  
\_\_\_\_\_

**\*Please Check One or More Information Request Choices:**

\_\_\_\_\_ Self Directed IRA

Permits traditional & non-traditional investments, such as investment real estate.

\_\_\_\_\_ Self Directed 401k

Permits traditional & non-traditional investments, such as investment real estate, or the purchase of a business or franchise.

\_\_\_\_\_ Non-Recourse Loans

For leveraged IRA or 401k real estate investment buys, \$200K to \$2 million loans.

\_\_\_\_\_ SDIS® (Self Directed Installment Sale)

Permits deferral of capital gains tax and recaptured depreciation on the sale of appreciated capital assets, such as real estate, or a business.

SDIS® may be combined with a “non like-kind” 1031 exchange to eliminate “boot”.

Free numerical illustrations are available for the SDIS®

Note: SDIS® must be set up prior to any property purchase offer, or escrow.

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Assets First® does not sell real estate, or any other investments, nor do we derive any commission or other fee from your real estate or business broker professional.

Information provided will be treated as confidential and will be used only for communications relating to your specific business request.

Generally a brief phone conversation is the most productive method of determining the viability of any specific strategy for achieving your particular investment or tax management objectives.

Please call us directly at any time.

**FAX THIS FORM TO - 865-220-9006**

Contact: Chris Wetherall, CEA 877-626-2628 / [chris@nafep.com](mailto:chris@nafep.com)