

Precious Metals Transfer Form

1. YOUR INFORMATION

Your Name:		New Direction Account Number:	
Social Security Number:	Email Address:	Phone Number:	
Legal Address:	City:	State:	Zip:

2. TRANSFER INFORMATION (Where are these assets currently?)

Name of Custodian/Trustee:		Account Number:	
Office Address:	City:	State:	Zip:
Contact Name:	Phone Number:	Fax Number:	<input type="checkbox"/> I have attached a copy of my current statement. (Required)

3. ACCOUNT TYPES

I am transferring funds **from**:

Traditional IRA Roth IRA SEP IRA SIMPLE IRA Inherited IRA HSA Coverdell Savings Account

I am transferring funds **to**:

Traditional IRA Roth IRA SEP IRA SIMPLE IRA Inherited IRA HSA Coverdell Savings Account

4. TYPE OF ASSET TO BE TRANSFERRED

Complete Transfer.

Cash* - Liquidate asset(s) and transfer cash to **New Direction Trust Company FBO (My Name) IRA.**

In-Kind Transfer - Transfer asset(s) in-kind to **New Direction Trust Company FBO (My Name) IRA.**

Transfer the following asset(s) in-kind: (asset description) _____

Partial Transfer.

Cash* - Liquidate and send \$ _____ in cash to **New Direction Trust Company FBO (My Name) IRA.**

In-Kind Transfer - Transfer asset(s) in-kind to **New Direction Trust Company FBO (My Name) IRA.**

Transfer the following asset(s) in-kind: (asset description) _____

*New Direction requires 5 business days for checks to clear. Bank wires and money orders clear the business day after deposit.

5. DELIVERY INSTRUCTIONS

I would like my funds sent to New Direction Trust Company via:

Check/Mail Wire to **New Direction Trust Company FBO (My Name) IRA.**

Please send this transfer form to the resigning custodian via:

Mail Express Delivery (\$30 fee. Please select a payment option below.)

Fax Number: _____ (You must ask your current custodian if they accept a faxed copy of the transfer form and you will need to provide fax number)

I would like to pay my express charges via:

Choose One:

Credit Card

Check Enclosed (make checks payable to: New Direction Trust Company)

Credit Card Type: (the following are accepted) Visa MasterCard Discover

Card Number: _____ 3 Digit Security Code: _____ Exp Date: _____

Exact Name on Card: _____ Signature: _____

6. DEPOSITORY INFORMATION

My metals are currently held at: _____ Depository

Account Number: _____

My metals are to be sent to: _____ Depository
(Please be sure to complete an updated Depository Election Form.)

7. SIGNATURE AND ACKNOWLEDGEMENT

Signature and Acknowledgement (This does not constitute a direct rollover.)

- I hereby agree to the terms and conditions set forth in this account asset transfer authorization and acknowledge having established a self-directed IRA through execution of the account application.
- I understand the rules and conditions applicable to an account transfer.
- I qualify for the account transfer of assets listed in the asset liquidation above and authorize such transactions.
- I understand that no one at New Direction Trust Company has authority to agree to anything different than my foregoing understandings of New Direction Trust Company policy.
- I understand that if this transfer is occurring during or after the calendar year during which I attain the age of 70½, the required minimum amount determined under this IRA is still required to be distributed.
- I further understand that the current Trustee/Custodian is not responsible for making this distribution prior to the transfer. I accept full responsibility for satisfying the required minimum distribution applicable to this IRA by withdrawing sufficient amounts from another IRA prior to the deadline for receiving minimum distributions for the calendar year of the transfer.
- If this transfer leaves the transfer or IRA in one year but does not reach the transferee IRA until the following year, I understand that this will be an "outstanding transfer" as of December 31st. The new IRA must "deem" that the transfer was received as of the prior December 31st for determining any required minimum distribution from the transferee IRA for the year that the transfer was received. I will inform the transferee IRA Trustee/Custodian of any such outstanding transfer.

Your Signature: _____

Date: _____

8. ACCEPTANCE OF RECEIVING CUSTODIAN (office use only)

New Direction Trust Company agrees to serve as Custodian for the account of the above-named individual, and as Custodian, New Direction Trust Company agrees to accept the assets of the account being transferred. New Direction Trust Company assumes no trust or fiduciary obligations to you as it has no investment control over your funds and acts only as the Custodian of your funds.

New Direction Trust Company

By: _____ Date: _____ Account #: _____