

PART 1. ACCOUNT OWNER INFORMATION

First Name:	M.I.:	Last Name:	Account #:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last 4 SSN:	Date of Birth: (MM/DD/YYYY)	Email Address:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

PART 2. ASSET INFORMATION

Asset Name / Description:	Asset Reference #: (If applicable)
<input type="text"/>	<input type="text"/>

PART 3. DOCUMENT INFORMATION

Please list the documents that require a signature individually below. Note, the documents must be related to an asset currently held in your account.

Documents Requiring Signatures

I have read and approved the documents I am requesting to be signed.

Document 1:	Document 2:
<input type="text"/>	<input type="text"/>
Document 3:	Document 4:
<input type="text"/>	<input type="text"/>

Check here if additional documents are listed on an attached addendum. Total number of addendums attached: _____

Document Titling

Please see the below example for correct account and asset titling information. The account and assets must be titled in this way to reflect your IRA being the legal owner of the investments and assets. Incorrect titling may cause delays in processing your request or taxable consequences.

“Digital Trust FBO: (Your Name) (Account Type)”

Example: Digital Trust FBO: Jane Doe Roth IRA

Document Handling

We will provide you with an electronic copy of the signed documents. If you would like us to mail, email, or fax a copy to a third party, please provide their information below.

MAIL: Please mail the above reference documents to the following individual: *(Complete the following information)*

Attention to:

Send signed documents via:

Regular Mail

Overnight Mail (\$40.00)

Address:

City:

State:

Zip:

EMAIL: Please email the above reference documents to the following individual: *(Complete the following information)*

Attention to:

Email:

FAX: Please fax the above reference documents to the following individual: *(Complete the following information)*

Attention to:

Fax #:

Additional Processing Instructions / Notes

PART 4. ACCOUNT OWNER AUTHORIZATION

I certify that all information provided by me is correct and may be relied upon by the Custodian. I understand that I am responsible for determining eligibility requirements related to my account(s) and investments and if necessary have sought assistance from qualified legal, tax, or investment professionals.

Signature of IRA Owner:

IRA Owner Name: *(Print or Type)*

Date: *(MM/DD/YYYY)*