

## PRECIOUS METAL RETIREMENT ACCOUNT SETUP

### ACCOUNT HOLDER

Name \_\_\_\_\_ SS # \_\_\_\_\_ DOB \_\_\_\_\_  
 Address \_\_\_\_\_ Phone # \_\_\_\_\_  
 City / State / Zip \_\_\_\_\_ Email \_\_\_\_\_

### DESIGNATION OF BENEFICIARIES

Name \_\_\_\_\_ SS # \_\_\_\_\_ DOB \_\_\_\_\_  
 Address \_\_\_\_\_ Phone # \_\_\_\_\_  
 City / State / Zip \_\_\_\_\_ Email \_\_\_\_\_  
 Relationship \_\_\_\_\_ % of Share \_\_\_\_\_

### CURRENT CUSTODIAN'S INFORMATION

Name \_\_\_\_\_ Account # \_\_\_\_\_  
 Address \_\_\_\_\_ Phone # \_\_\_\_\_  
 City / State / Zip \_\_\_\_\_ Fax # \_\_\_\_\_

### ASSET LIQUIDATION INSTRUCTIONS

Account Description	Quantity in Account	Quantity to be Transferred
_____	_____	_____
_____	_____	_____
_____	_____	_____

This will ☐, will not ☐ close my current Retirement Plan

### OFFICIAL USE ONLY

Account Representative \_\_\_\_\_ Account Number \_\_\_\_\_

### COMPLETION OF THIS FORM GUARANTEES ACCOUNT SETUP.

Signature \_\_\_\_\_ Date \_\_\_\_\_