



GOLDSTAR TRUST COMPANY

IRA TRANSFER REQUEST

(Incoming into GoldStar)

P. O. Box 719
Canyon, TX 79015
(800) 486-6888
Fax (806) 655-2490
forms@goldstartrust.com

PART 1. GOLDSTAR ACCOUNT INFORMATION

Name GoldStar Account No.
Social Security No. Date of Birth

PART 2. TELL US ABOUT THE ACCOUNT YOU ARE TRANSFERRING

Delivering Firm Phone Number
Mailing Address
Delivering Firm Account No. Fax Number

Traditional SEP Simple Roth Direct Rollover* Other

*To initiate a direct rollover from an employer-sponsored retirement plan (401K, 403B, GOV 457, Pension, etc.) contact your plan administrator.

A STATEMENT FROM THE DELIVERING FIRM MUST BE PROVIDED TO TRANSFER INTO GOLDSTAR TRUST COMPANY.

Full Liquidation & Transfer of Entire Account Partial Transfer \$
Full In-Kind Transfer Asset Description Quantity or Amount to be Transferred

PART 3. DELIVERY INSTRUCTIONS - SELECT ONE

GoldStar Registration FBO Client Name Account No. Account Type

Table with 4 columns: Wire Funds, Overnight Funds, Regular Mail, In-Kind Registration. Each column contains a checkbox, a brief description, and detailed instructions for that delivery method.

PART 4. CUSTOMER SIGNATURE

Transfers Only: I authorize the transfer of IRA assets in the manner described above and certify that all the information provided by me is correct...
Direct Rollovers Only: I understand the rules and conditions applicable to direct rollovers and certify that I qualify for a direct rollover of the funds or assets listed above.

X Physical Signature Required Date (mm/dd/yyyy)

PART 5. GOLDSTAR LETTER OF ACCEPTANCE

GoldStar Trust Company agrees to serve as the new custodian for the account of the above-named individual, and as Custodian, we agree to accept the assets being transferred.

X Authorized Signature for GoldStar Date (mm/dd/yyyy)

Signature Guarantee: Check with your current custodian to determine if a Medallion Stamp Guarantee is required. This is NOT a requirement of GoldStar Trust Company.