



**CUSTODIAL ACCOUNT TRANSFER FORM**

[To be used to transfer non-qualified funds into a GoldStar Custodial account (GAMMA)]

**IMPORTANT: Registration must be identical to the registration on the account you are transferring.**

Current Account Registration: \_\_\_\_\_

Primary Account Holder: \_\_\_\_\_ Social Security/Tax ID Number: \_\_\_\_\_

Home Phone #: \_\_\_\_\_ Work / Cell #: \_\_\_\_\_

Co-Account Holder, If Applicable: \_\_\_\_\_

Home Phone #: \_\_\_\_\_ Work / Cell #: \_\_\_\_\_

**Non-Qualified Account Information**

Name of Current Custodian

Address

City  State  ZIP

Prior Custodian A/C#  Telephone #

**Please provide a copy of your most recent statement for the account you are transferring.**

**Please transfer \_\_\_\_\_ ALL or \_\_\_\_\_ Part of my Custodial Account balance to my Custodial Account at GoldStar in the manner listed below: (If you check the "ALL" box, you do not need to complete the remainder of this section.)**

Asset Description	Quantity in Account	Quantity To Be Transferred	Liquidate Immediately	Liquidate at Maturity	Transfer in Kind
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Delivery Instructions**

This account currently only accepts cash and church/charter school bonds.

Please make checks payable as follows:  
GoldStar Trust Company as Custodian FBO \_\_\_\_\_ GAMMA  
(Account Registration)

Please re-register all church/charter school bonds as follows:  
GoldStar Trust Company Custodian  
FBO: \_\_\_\_\_ GAMMA  
(Account Registration)

**Client Authorization**

I authorize the transfer of the IRA assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by GoldStar Trust Company.

\_\_\_\_\_  
(Primary Account Holder's Signature) (Date)

\_\_\_\_\_  
(Signature of Co-Account Holder) (Date)

**GoldStar Trust Company Letter of Acceptance**

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

GoldStar Account Identification # \_\_\_\_\_

GoldStar Trust Company  
PO Box 719  
Canyon, TX 79015

Please use the Social Security or Tax ID # of the primary account holder for re-registration(s). Do **not** use GoldStar Trust Company's Tax ID# for this type of account.

\_\_\_\_\_  
(Successor Custodian Authorized Signature) (Date)