



All stock and mutual fund trade directions must be received by 12 PM CST, or 1 hour prior to market closing on shortened trading days, in order to be executed before close of market. All investment directions received after the cut-off time will be executed the next business day.

This form contains important disclosures about your duties and responsibilities with regard to holding a publicly traded asset within your self-directed IRA. To make an investment through a self-directed IRA, you must first establish a valid IRA and have cash available in the IRA. GoldStar Trust Company ("GoldStar") does not offer investment advice and does not buy or sell investment products. GoldStar is disqualified by the Internal Revenue Code from trading with an IRA for which it is the custodian. GoldStar is compensated through administrative fees and cash management fees. Please refer to the Fee Schedule or call GoldStar for any applicable fees regarding this investment.

**PART 1. GOLDSTAR ACCOUNT OWNER**

Name (First/MI/Last) \_\_\_\_\_ Phone Number \_\_\_\_\_  
Address 1 \_\_\_\_\_ Email Address \_\_\_\_\_  
Address 2 \_\_\_\_\_ Account Number \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  New Account Pending

**PART 2. REQUIRED DIRECTIONS FOR MUTUAL FUNDS**

I authorize and direct GoldStar to purchase, or liquidate (sell) mutual funds (as indicated below).

Purchase  Liquidate (sell)

Mutual Fund Name \_\_\_\_\_ Class \_\_\_\_\_ Symbol \_\_\_\_\_  
Amount \$ \_\_\_\_\_ OR Shares \_\_\_\_\_

- If this is your first mutual fund purchase through GoldStar, the process of establishing a fund account may take up to 10 business days.
- If you have previously invested in mutual funds, but are choosing a new fund to invest in, the process may take up to 5 business days.

**PART 3. REQUIRED DIRECTIONS FOR STOCK TRADES**

I authorize and direct GoldStar to purchase, or liquidate (sell) stocks (as indicated below).

Purchase  Liquidate (sell)

Security Name \_\_\_\_\_ Symbol \_\_\_\_\_  
Number of Shares to Buy/Sell \_\_\_\_\_

- All security orders are placed as Market Orders.

**PART 4. SIGNATURE**

I direct GoldStar Trust Company ("GoldStar") to execute the purchase of the above-named Investment for the benefit of my self-directed IRA. Fax, mail or e-mail the signed original of this document to GoldStar and keep a copy for your records.

X \_\_\_\_\_ Date (mm/dd/yyyy)  
Signature of Account Holder

**THIS FORM EXPIRES 60 DAYS AFTER THE SIGNATURE DATE AND IS VALID ONLY ONCE.**