



**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 \$ \_\_\_\_\_  
*(Cash amount or list the assets below for In-Kind)*

<input type="checkbox"/> Full In-Kind Transfer	Asset Description <i>(In-Kind only)</i>	Quantity or Amount to be Transferred
	_____	_____
	_____	_____

**PART 3. DELIVERY INSTRUCTIONS - SELECT ONE**

GoldStar Registration FBO \_\_\_\_\_  
Client Name \_\_\_\_\_ Account No. \_\_\_\_\_ Account Type \_\_\_\_\_

<input type="checkbox"/> <b>Wire Funds</b> <i>(fees may apply)</i>  Happy State Bank 100 E. Main Street, Happy, Texas 79042 Routing Number: 111310870 Account Number: 6002000773 Further Credit: GoldStar Trust Company (client's name and account number)	<input type="checkbox"/> <b>Overnight Funds</b> <i>(fees may apply)</i>  GoldStar Trust Company 1401 4th Avenue Canyon, Texas 79015	<input type="checkbox"/> <b>Regular Mail</b>  GoldStar Trust Company P.O. Box 719 Canyon, Texas 79015	<input type="checkbox"/> <b>In-Kind Registration <i>(Securities)</i></b>  GoldStar Trust Company FBO: (client's name and account type) Tax ID: 74-2557688  It is the policy of GoldStar Trust Company ("GoldStar") to only accept securities that have been re-registered to GoldStar prior to transfer. Any securities received that have not been re-registered to GoldStar will be returned to the current custodian for re-registration prior to acceptance.
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**NOTE:** Separate delivery instructions will be provided for Precious Metals, Stock and Mutual Funds In-Kind.

**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 and may be relied upon by GoldStar Trust Company. I understand that I am responsible for determining my eligibility to transfer within the limits set forth by tax laws, related regulations and plan agreements. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree GoldStar Trust Company shall in no way be held responsible.

**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. Due to the important tax consequences of rolling funds over to an IRA or other qualified plan, I have been advised to see a tax advisor. I hereby request payment from the plan designated above in the form of a direct rollover. I assume full responsibility for this direct rollover transaction and will not hold GoldStar Trust Company or the plan administrator of either the distributing or receiving plans liable for any adverse consequences that may result. I hereby irrevocably designate this contribution of the funds and/or property indicated above as a direct rollover contribution.

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 you current custodian to determine if a Medallion Stamp Guarantee is required. This is NOT a requirement of GoldStar Trust Company.