



This form contains important disclosures about your duties and responsibilities with regard to holding precious metals within your self-directed IRA. Please complete all information for your investment to avoid a delay in processing. 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.

### PART 1. GOLDSTAR ACCOUNT OWNER

Name \_\_\_\_\_ Account No. \_\_\_\_\_  
Email Address \_\_\_\_\_ Phone No. \_\_\_\_\_

### PART 2. TRANSACTION ELECTION AUTHORIZATION

Please provide the contact information of the Precious Metals Dealer ("Dealer") you have chosen to handle your transaction.

Company \_\_\_\_\_ Representative \_\_\_\_\_

I authorize and direct GoldStar to purchase, liquidate (sell), or exchange precious metals (as indicated below) with the Dealer listed above.

☐ Purchase

**FUNDS COMING IN FROM MULTIPLE TRANSFERS OR ROLLOVERS?** (if applicable)

☐ Wait until all IRA funds are received before notifying my Dealer (If applicable and left unchecked your Dealer will be notified as soon as IRA funds become available. This may result in more than one transaction and require you to complete additional Investment Direction forms.)

☐ Liquidate (sell)

☐ Exchange

I acknowledge that by submitting this request I will contact my Dealer and agree upon a purchase price/selling price/or exchange for my metals. The Dealer will submit an invoice, which will list all final prices. I understand that GoldStar is not responsible for contacting the Dealer and establishing a purchase/sale/exchange price. I further understand that the Dealer listed on this form may contact GoldStar to receive information regarding this investment and current holdings to complete the purchase/sale/exchange. **GoldStar will notify your dealer of your intent upon receipt of this form. If you do not hear from your dealer within 48 business hours, please contact your dealer to make sure your instructions were received.**

### PART 3. PRECIOUS METALS DEPOSITORY INFORMATION

Only one Depository can be used to store metals per account. Metals held in an account cannot be split between depositories. Once a depository is chosen, it will be the default for future transactions. If this transaction is a first purchase and a depository is not indicated below, the purchase will not move forward until we receive your selection. If a storage option is not indicated, commingled storage will be the default storage option.

<b>A-M Global Logistics, LLC</b> (AMGL)	<b>Delaware Depository® -</b> <b>Delaware</b> (Depository Trust Company of Delaware, LLC)	<b>IDS of Delaware</b> (International Depository Services Group)	<b>Texas Precious Metals</b> <b>Depository</b> (TPMD)
Las Vegas, NV A-M Global Logistics, LLC provides Commingled and segregated Storage for Gold, Silver, Platinum, and Palladium.	Wilmington, DE Delaware Depository provides Commingled Storage for all metal types, and Segregated Storage for all Gold, Platinum, and Palladium products, and 1000 oz. Silver bars. Segregated Storage is not available for Silver products smaller than 1000 oz. bars.	New Castle, DE IDS of Delaware provides Commingled and Segregated Storage for Gold, Silver, Platinum, and Palladium.	Shiner, TX TPMD provides only segregated storage for Gold, Silver, Platinum and Palladium.

Additional fees apply to the Segregated Storage option. Please call GoldStar for any applicable fees regarding either storage option for your precious metals investment. All fees, including those past due, must be paid before any applicable transactions will be processed.

### PART 4. SIGNATURE AND ACKNOWLEDGMENTS

By signing I hereby acknowledge that I have read and agree with the information provided on the following page. By signing below, you are indicating that you have read, understand, and agree to the foregoing representations made on this Investment Direction form and that all are true and accurate as of the date hereof and shall be true and accurate as of the date of delivery of the funds to the Investment and shall survive such delivery.

X \_\_\_\_\_

Signature of Account Holder

\_\_\_\_\_ Date (mm/dd/yyyy)



## PART 5. ACKNOWLEDGMENTS

I direct GoldStar Trust Company ("GoldStar") to execute the purchase of the investment stated on this form for the benefit of my self-directed IRA. I hereby make the following acknowledgments, agreements and representations:

- I understand that GoldStar is compensated through administrative fees and cash management fees.
- I am solely responsible for the selection of my Dealer and negotiation of prices and terms and GoldStar has made no representations or recommendations with regards to this Dealer. I have evaluated the risks involved with this transaction and have conducted the due diligence I felt appropriate on the Dealer I have selected.
- I authorize GoldStar to proceed with my instructions directed on this form (purchase, sale or exchange of precious metals) according to the details provided by my Dealer and without further written or verbal authorization from me.
- I acknowledge receipt of disclosure concerning price spread for proof coins from my Dealer, if applicable (see Investment Disclosures for Precious Metals IRAs).
- I acknowledge that this investment is not FDIC insured and may lose value. In addition, the investment selected by the undersigned may lack liquidity; may be speculative and involved a high degree of risk; and may result in a complete loss of the investment.
- I understand that if this Investment Direction and any accompanying documentation are not received as required, or, if received, are unclear in the opinion of GoldStar, or if there are insufficient undirected funds in my account to fully comply with my instructions to purchase the investment and to pay all fees, GoldStar may not process this transaction until proper documentation and/or clarification is received, and GoldStar will have no liability for loss of income or appreciation.
- I understand that neither GoldStar nor any employee or agent of GoldStar has selected or recommended any investment for me; and neither GoldStar nor any employee or agent of GoldStar has acted as a broker-dealer or salesperson in completing any purchase or sale of an investment of a security for me.
- I certify that the precious metals investment(s) directed on this form are not prohibited transactions as defined in the Internal Revenue Code; that the investments are in precious metals that are permitted to be held in an IRA pursuant to IRC 408(m)(3)(A)(i)-(iv) and 408(m)(3)(B); and that I have consulted with a legal or tax professional to the extent necessary for me to make this certification. I certify that I have not received any legal or tax advice from GoldStar or its employees.
- I am solely responsible for reading my IRA statement and confirming that precious metals quantities and prices, either bought, sold or exchanged, agree with arrangements I have made with my Dealer.
- I understand that precious metals investments are received by, stored at, and delivered from a depository. Annual fees are due for this storage, and neither GoldStar nor the depository is responsible for purity, weight, metal content, or authenticity of any coins or bars.
- I understand that, if my Representative or any other financial representative suggested that I retain the services of GoldStar as custodian for the Investment made through my IRA, that such person is not in any way an agent, employee, representative, or affiliate of GoldStar. I acknowledge that GoldStar is not responsible for and is not bound by any representations, warranties, statements or agreements made by my Representative or any financial representative beyond the terms and provisions contained in my GoldStar Custodial Account Agreement and other GoldStar forms.
- I understand that precious metals shall be stored at one of the depository options chosen by the account holder. I agree that if I do not indicate a depository, Delaware Depository will be the default depository. I understand and direct GoldStar to open the storage account in accordance to my elected storage method, Commingled or Segregated, with the depository I have selected. I also understand and agree that if I do not indicate a storage option, Commingled Storage will be the default storage option.
- **Commingled:** Investment choice whereby a storage firm maintains a client's precious metals in bulk by like kind. In other words, the precious metals received at time of sale or in-kind distribution will be of like kind, but not guaranteed to be the exact coins or bars originally bought. **Segregated:** Investment choice whereby a storage firm maintains a client's precious metals assets separately from all commingled assets held by other investors. Traditionally, the assets are held in an individual storage box or vault depending on the size of the investment assigned to each client. In other words, the precious metals you purchase are the exact physical allotments of gold, silver, platinum, or palladium that are protected in your storage space.
- The undersigned consents to the fee schedule of GoldStar as in effect, as may be modified from time to time. I understand transactions with insufficient funds will not be processed until sufficient funds are received. If fees are being deducted from my account, the full amount of the transaction plus fees must be available before the transaction can be processed.
- I understand that with exception of cash invested in an FDIC insured bank account, investments held in my IRA may lose value, are not FDIC insured, and are not guaranteed by GoldStar.
- I understand that if this Investment Direction and any accompanying documentation are not received as required, or, if received, are unclear in the opinion of GoldStar, or if there are insufficient undirected funds in my account to fully comply with my instructions to purchase the investment and to pay all fees, GoldStar may not process this transaction until proper documentation and/or clarification is received, and GoldStar will have no liability for loss of income or appreciation.
- An IRA may hold investments in certain precious metals allowed by the Internal Revenue Code. Coin or bullion that is not specifically permitted are considered to be collectibles and are disallowed for IRAs. The allowable exceptions were broadened by the Taxpayer Relief Act of 1997, effective January 1, 1998. The specific precious metals permitted are: silver, gold and platinum American Eagle coins, a coin issued under the laws of any State, and gold, silver platinum or palladium bullion that meets the minimum fineness requirements. Currently, gold must be .9950 pure, silver must be .9990 pure, and both platinum and palladium must be .9995 pure to qualify. Bars, rounds and coins must be produced by a refiner, assayer or manufacturer that is accredited/certified by NYMEX, COMEX, NYSE/Liffe, LME, LBMA, LPPM, TOCOM, ISO 9000, or national government mint in order to be accepted by GoldStar. Proof coins must be ungraded, complete with certificate of authenticity and in original mint packaging. Bullion coins must be uncirculated in excellent condition.

I understand that if in any respect such representations and warranties shall not be true and accurate prior to delivery of the funds to the Investment, I shall give written notice of such fact to GoldStar specifying which representations are not true and accurate and the reasons therefore.