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Precious Metals IRA Setup and Confirmation Form

Account Representative _____ Account Name _____

IRA Account Holder

Name _____ SS# _____ DOB _____

Address _____ Day Phone _____

City/State/Zip _____ Eve Phone _____

Driver License # _____ DL State _____ DL Issue Date _____ DL Expiration Date _____

Designation of Beneficiaries

Name _____ SS# _____ DOB _____

Address _____ Share % _____

Relationship _____ Day Phone _____

Current IRA Custodian's Information (If transferring from an existing Retirement Account)

Name _____ Account # _____

Address _____ PIN # _____

City/State/Zip _____ Day Phone _____

Asset Liquidation Instructions from a Transfer or Rollover of an Existing Retirement Account

Asset Description	Quantity in IRA	Quantity to be transferred
_____	_____	_____

This Will Will Not Close my Current Retirement Plan

By signing this document the client agrees and understands that Numis Financial will prepare the precious metals IRA custodian application and transfer forms on the behalf of the client.

Signature _____ Date _____