

(LIBERTY TRUST COMPANY ACCOUNT NUMBER)

Use this form to transfer all or part of the assets from an IRA with another custodian to your IRA with Liberty Trust Company, Ltd.

FOR PROCESSING, RETURN TO: IPS ♦ 8226 Douglas Avenue ♦ Suite 520 ♦ Dallas, Texas 75225-5927 ♦ 800-473-1977 ♦ 855-739-1987 FAX

1 ACCOUNT OWNER INFORMATION

Legal Name: _____ Date of Birth: _____

Address: _____ Soc. Sec. Number: _____

City, State, Zip: _____

Type of Account at Liberty Trust Company, Ltd. (check one):

Name of deceased: _____

Traditional IRA Roth IRA SEP IRA SIMPLE IRA This is also an Inherited IRA _____

2 CURRENT CUSTODIAN INFORMATION

Name of Custodian: _____ Contact: _____

Address: _____ Phone: _____

City, State, Zip: _____ Account Number: _____

Type of Account being transferred (check one):

Name of deceased: _____

Traditional IRA Roth IRA SEP IRA SIMPLE IRA This is also an Inherited IRA _____

3 TRANSFER INSTRUCTIONS—Please provide a copy of the most recent Account Statement from your existing Custodian

I hereby authorize Liberty Trust Company to send the Account Transfer Request to my existing Custodian utilizing the following method: Regular Mail Overnight Mail (\$35) Fax: _____ (verify with current custodian)

WARNING REGARDING LIQUIDATION ORDERS

Although you may request your current Custodian to liquidate some or all of your holdings into cash and transfer the cash to us, please be aware that **MANY CUSTODIANS WILL NOT HONOR THE LIQUIDATION REQUEST** and will return your transfer request to us. To avoid delays in processing, we strongly recommend that you verify that your account at your current Custodian has sufficient cash to allow for the transfer. This means that you may have to liquidate some or all of your holdings prior to the time this Account Transfer Request is sent to your current Custodian.

By signing this form, the Account Owner hereby authorizes the current Custodian to transfer the assets noted below.

COMPLETE TRANSFER Estimated Amount: \$ _____

- Liquidate all assets and transfer proceeds to Liberty Trust Company, Ltd. Proceed to section 4.
- Transfer all assets "in-kind" along with any cash balance to Liberty Trust Company, Ltd. Proceed to section 4.

PARTIAL TRANSFER

- Send \$ _____ in cash to Liberty Trust Company, Ltd.
- Transfer the assets noted below "in-kind" to Liberty Trust Company, Ltd.

<u>Asset Name</u>	<u>Units</u>	<u>Price per Unit</u>	<u>Market Value</u>

Note: Partial transfers less than \$2,000 will result in a processing fee of \$50

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DELIVERY INSTRUCTIONS

Regular Mail

IPS

8226 Douglas Avenue, Suite 520
Dallas, TX 75225

Make check payable to:

Liberty Trust Company, Ltd., Custodian
FBO: (client's name) IRA # _____

Overnight Mail

IPS

8226 Douglas Avenue, Suite 520
Dallas, TX 75225

Make check payable to:

Liberty Trust Company, Ltd., Custodian
FBO: (client's name) IRA # _____

Wire (additional \$25 fee applies)

Third Coast Bank SSB

20202 Hwy 59 N Ste. 190
Humble, TX 77338

ABA Number: **113094149**

Liberty Trust Company, Ltd.

101 S. Reid St. Ste. 307
Sioux Falls, SD 57103

Acct. Number: **1000019370**

Ref: (client's name) IRA # _____

Asset Registration Instructions:

The registration / title for the investment and other related documents must reflect the name of Liberty Trust Company, Ltd., the name of the Account Owner, the account number, and Liberty Trust Company, Ltd.'s Tax ID Number.

Tax Identification Number: 90-0909159 **Liberty Trust Company, Ltd., Custodian FBO: (client's name) IRA # _____**

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ACCOUNT OWNER TRANSFER AUTHORIZATION AND SIGNATURE

I hereby agree to the terms and conditions set forth in this Account Transfer Request and acknowledge that I have established an account of the type designated in section 1 of this form. I acknowledge that I understand the rules and conditions regarding Account Transfers and I certify that I qualify for the Account Transfer of assets listed in the Transfer Instructions above and authorize such transactions.

I UNDERSTAND that if funds are wired to Liberty Trust Company, Ltd. (LTC), LTC will deduct the incoming wire fee from my account unless I have prepaid such fee.

I HEREBY AUTHORIZE the present Custodian to deliver my cash and/or assets as noted above.

Check with your current Custodian to see if a Medallion Signature Guarantee is required. A Medallion Signature Guarantee may be obtained at a brokerage firm, bank, or other financial institution. Liberty Trust Company will not provide a Medallion Signature Guarantee.

Medallion Signature Guarantee

Signature: **X** _____

Date: **X** _____

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LETTER OF ACCEPTANCE BY LIBERTY TRUST COMPANY, LTD.

Liberty Trust Company, Ltd. will accept the transfer described above as Successor Custodian and agrees to apply the proceeds, upon their receipt, to the account established on behalf of the Account Owner named above.

By: _____

Date: _____

Printed Name: _____

Title: Authorized Signer