

IMPORTANT INFORMATION

- If you have not previously established an Equity Trust Company account to receive your transfer, you must include an account application with this form.
- Each account that is being transferred requires a separate Account Transfer Form.
- For all liquidation requests, contact your current Custodian to initiate and complete the liquidation process prior to submitting the Account Transfer request with Equity Trust Company.

 Note: The term "in-kind" refers to the re-registration of a s Some Custodians require a Medallion Signature Guarantee 					
1 ACCOUNT HOLDER INFORMATION ACCOUNT HOLDER NAME		ACCOUNT NUMBER ASSIGNED BY EQUITY TRUST			
SOCIAL SECURITY NUMBER		DATE OF BIRTH (optional)			
2 CURRENT CUSTODIAN INFORMATIO	N (Provide a conv	of your most	recent statement		
ACCOUNT REGISTRATION (as it appears on the statement)	(Flovide a copy	or your most	<u> </u>	s it appears on the statement-one per form)	
NAME OF COMPANY			ESTIMATED TRANSFE \$	er value:	
STREET ADDRESS*	CITY		STATE	ZIP CODE	
PHONE		FAX*			
* Contact your current custodian to confirm the address where transfe	CENT STATEME	·	,		
3 ACCOUNT TRANSFER INSTRUCTION	NS ONLY				
Account Type Being Transferred:			To Equity Trust Accoun	nt Type:	
☐ Traditional IRA ☐ SIMPLE IRA ☐ Roth IRA ☐ HSA ☐ SEP IRA ☐ Qualified Plan [ex. 401(k)] ☐ Education (CESA) ☐ Qualified Plan - Roth [ex. 401	(k)]		☐ Traditional IRA ☐ Roth IRA ☐ SEP IRA ☐ Education (CESA)	SIMPLE IRA HSA Qualified Plan [ex. 401(k)] Qualified Plan - Roth [ex. 401(k)]	
Check here if this is an inherited account			Check here if this is a	an inherited account	
/ PROGRAMA PREEDENCE					
4 PROCESSING PREFERENCE (Choose h	ow you would like t	_			
 □ EXPRESS TRANSFER SERVICE (See Fee Schedule) • If corrections are needed, processing will stop until 		Send Overnight via Third Party Billing☐ FedEx☐ UPS			
corrections have been made.		THIRD PARTY BILLING ACCOUNT NUMBER			
Overnight mail and/or wire service (if applicable) are i	ncluded.	THIRD PARTY ZI	P CODE		
OVERNIGHT MAIL SERVICE (See Fee Schedule) Your transfer form will be sent overnight.		□ NORMA	L MAIL PROCESSING		
5 PAYMENT INFORMATION					
	☐ Deduct Fees fro	m Account	☐ Check Enclosed	INTERNAL USE ONLY	
NOTE: By checking credit card on file, you authorize Equity this transaction. To change or update a credit card, plea curred will be deducted from available cash in the account	ase visit www.mye				

P. O. BOX 451340 | WESTLAKE, OHIO 44145 | PHONE: (888) 382-4727 | FAX: (440) 366-3755 | WWW.TRUSTETC.COM | EMAIL: HELP@TRUSTETC.COM



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6 TRANSFER INSTRUCTIO Type of Transfer:	NS FOR CURRENT CUST	ODIAN					
Type of Iransfer:							
Full Transfer Liquidation(s) must be comple	Cash Only ted prior to transfer request	Transfer all assets in-kind					
Partial Transfer	Cash Amount (if applicat	ole) \$					
LIST ASSETS FOR PARTIAL TRANSFER	BELOW	Number of Shares or Valu	e				
1.							
2.							
3.							
4.							
If more lines are necessary to list add							
Yes, an additional Asset Sh	eet is attached. Please remember to	o sign and date.					
7 IN-KIND METALS TRAN	SFER ONLY						
Each account is able to select one depo		etals. If metals are stored at	t multiple facilit	ies available w	vithin that		
depository company, a storage fee wil	l be assessed for each location.			1			
Brink's Inc.	Delaware Depository	International Depository S	Services (IDS)	AMGL			
Location: Los Angeles 1821 S. Soto St.	Location: Delaware 3601N Market St. Wilmington, DE 19802	Location: Delaware 406 W Basin Rd New Castle, DE	19720	Location:	Nevada 6055 Surrey St, Ste 105		
Los Angeles, CA 90023 New York		Texas	17720		Las Vegas, NV 89119		
18445 147th Ave,	☐ Nevada	11925 N Stemn	nons Fwy, Ste 180,		Texas		
Springfield Gardens, NY 11413	1009 Industrial Rd. Boulder City, NV 89005	Dallas, TX 752.	34		8732 N. Royal Ln.		
Salt Lake City 3635 W 1820 S	,				Irving, TX 75063		
Salt Lake City, UT 84104							
Sending Custodian: Please r	efer to Transmittal Coupon for Deliv	ery Instructions					
8 INSTRUCTIONS FOR DE	ELIVERY (Choose how you want	your current Custodian to del	iver your assets	to Equity Trust	t Company.)		
Funds available immediately upon re-		Funds available up to			,		
☐ Incoming Wire Transfer:	Regular Mail/	Regular Mail/Regu	ılar Check				
(See Fee Schedule, included if you Cashier's Check			Overnight Mail/Regular Check				
selected Express Transfer Service)	Overnight Mail/		6				
Citi I	Cashier's Check	21/221/21/21/21					
WIRE TO: Citibank 451 Montgomery Street		OVERNIGHT MAIL: Equity Trust Company					
San Francisco, CA 94104		1 Equity Way					
RT # if wire originates in th		Westlake, OH 44145					
For information regarding international wires please visit: www.trustetc.com/incoming-wir		REGULAR MAIL:					
·	For Further Credit To:	Equity Trust Company P. O. Box 451340					
	Account Holder Name	Westlake, OH 44145					
	Account Number	Make Checks Payable to					
Account #: 205575210			Equity Trust Company Custodian FBO Account Holder Name, Account #				
IMPORTANT REGISTRATION INFORMATION	ON						
Receiving Firm Information:	Register Physical Ce	rtificates to:	Mutual Fund F	Registration:			
Equity Trust Company Equity Trust Company			Equity Trust Company Custodian FBO Account Holder Name, Account #				
	FBO Account Holder Nar	ne, Account #	P. O. Box 451340		count #		
			Westlake, OH 4				

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9 ACCOUNT HOLDER SIGNATURE		
 A notary public CANNOT provide a Medallion Signature Guarantee. A signature guarantee can be obtained from your bank If your current custodian does not require a Medallion Signature Guarantee, you can simply sign and date this form. I certify that I have established or will establish a Self-Directed Account with the Custodian named below. I agree to the terms of this form. I understand that I am responsible for determining my eligibility for all transfers and I agree to indemnify and to hold the Custodian harmless against any and all situations arising from an ineligible transfer. I acknowledge that the Custodian cannot provide legal advice and I agree to consult with my own tax professional for advice. 		
Signature of Account Holder	Date	
LETTER OF ACCEPTANCE - FOR OFFICE USE ONLY		Place "Medallion Signature Guarantee" Stamp Here
Equity Trust Company accepts the appointment as successor custodian on behalf of the depositor and requests the transfer and/or liquidation of assets as instructed above.		
Authorized Signature, Equity Trust Company:		
Date:		
The following is a list of documents required who	en an asset is heing	transferred If the original document is not available a convinust be

The following is a list of documents required when an asset is being transferred. If the original document is not available a copy must be included at the time the *Account Transfer Form* is submitted.

ASSET BEING TRANSFERRED*	DOCUMENTS REQUIRED		
ENTITY:			
Limited Partnership	Operating Agreement, Subscription Agreement, PPM, Exhibits & Investor Questionnaire (if applicable), Filed Articles of Organization, transfer form		
Limited Liability Company	Operating Agreement, Subscription Agreement, PPM, Exhibits & Investor Questionnaire (if applicable), Filed Articles of Organization, transfer form		
Land Trust	Copy of Executed Land Trust Agreement, Assignment of Land Trust, Transfer Form		
Private Stock/C-Corporation	Filed Articles of Organization, Operating Agreement, PPM/Sub Doc + Exhibits (if applicable), Transfer Form		
Joint Venture	Executed Joint Venture Agreement, Assignment of Joint Venture, Transfer Form		
FOREX:	Copy of Foreign Currency Application		
GENERAL:			
Mobile Homes	Mobile Home Title		
Land Contract	Executed Land Trust Agreement, Assignment of Land Trust, Transfer Form		
Options	Option Agreement, Maturity Date, See Private Stock		
Annuities	Annuity Contract		
Structured Settlement	Copy of Settlement Agreement (original if available), Original Assignment or Original Contract, Copy of the Court Order transferring (if one exists)		
Lease Agreement	Lease Agreement		
Oil & Gas Venture	If not part of a Joint Venture, then only the AgreementIf part of a Joint Venture, the requirement of Joint Venture listed above		
PROMISSORY NOTE:			
Corporate Debt / Equity (Unsecured Notes)	Copy of Executed Note, Executed DOT/Mortgage, Assignment of Note & DOT/Mortgage from previous Custodian to ETC, Transfer form		
Note Secured by Real Property	Copy of Executed Note, Executed DOT/Mortgage, Assignment of Note & DOT/Mortgage from previous Custodian to ETC, Transfer form		
Note Secured by Collateral other than Real Property	Copy of Executed Note, Executed Security or Collateral Agreement, Transfer Form		
Unsecured Note	Copy of Executed Note, Assignment of Note from previous Custodian to ETC, Transfer form		
REAL ESTATE:			
Real Estate (includes pre foreclosure, subject to's and short sales)	Copy of Executed Deed - proof of ownership, Assignment from prior Custodian to ETC, Transfer form		
TAX LIEN:	Evidence of ownership from the county		
*A copy of the Current Custodian's Statement is requi	red with all assets being transferred.		

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