PREMIER TRUST
"It's A Matter Of Trust"SM

Welcome to Premier Trust!
We look forward to helping you setup your Self-Directed Traditional IRA.

Should you wish to move forward in opening an account, please complete and return the documents listed below, including a copy of your Photo ID and check in the amount of $175 made payable to Premier Trust Inc. for the Initial Account Setup Fee.

If you have any questions when completing the paperwork, please don't hesitate to give us a call.

Helpful tips:

1. IRA Account Application (page 1 & 2): In Part 1, complete your personal information. Part 3, indicate if funds will be received via IRA Transfer from another Custodian, Rollover from a qualified plan such as a 401(k), or if a Regular personal contribution will be made and the amount. The "Contribution Date" may be left blank. Part 4, complete having the application notarized and attach a CLEAR copy of your photo ID. For Part 5, please indicate your Primary and Contingent Beneficiaries. Please note, if you are married and choose not to name your spouse as primary, you will need your spouse's signature, as well as a witness in Part 6. Lastly, in Part 7, sign as the IRA Owner.
   ******Don't forget to include a copy of your Photo ID and if you do not have a "land line" listed as your home phone number be sure to include a copy of your cell phone bill******

2. IRA Transfer Form (IRA to IRA): If transferring cash from another Custodian to your new IRA at Premier Trust, please be sure the funds have been liquidated so they will be ready for transfer. In Part 1, complete your personal information and account type. You may leave "Account Number" blank as we will assign that to you once your account has been established. Part 3, select the box that most accurately describes your relationship to the IRA. Part 4, complete the personal information and include the account number of the IRA we will be requesting the funds from. Part 5 should contain the contact information for the custodian or institution your funds are held at. Please complete Part 6 if you are over 70.5. Part 7, indicate the type of transfer, leave the "Make Payable To" field blank, and if you plan to transfer assets In-Kind/Non-Cash (such as stocks, mutual funds, or other unique investments) list them on the lines provided and **provide us a copy of your statement**. Lastly, sign as IRA Owner in Part 8 – this form will not need to be notarized.

   *****Please Note:** If your funds will be coming over as a **Rollover from a Qualified Plan** such as a 401(k) to your IRA, you will need to contact the Plan Administrator to initiate the Rollover as in the vast majority of cases they will not accept our request on your behalf.

3. IRA Contribution Eligibility: Please complete parts 1, 3 and 4 if you plan to fund your IRA from money held in a qualified plan such as a 401(k).

4. IRA Trustee/Custodial Agreement & Fee Schedule – Please make your selections, initial and sign where indicated. If have difficulty completing this, don't hesitate to give me a call.

5. W9: Please complete, sign and date where indicated.

6. E-Statement Authorization: If you would like free online account access to either online access to your account or account statements, please complete and return.

7. Investment Directive: Complete the investment directive providing all the requested information for the asset you wish to purchase. If the details are unknown you can hold off sending it until after the account has been established – and work with your Trust Administrator to complete it.

8. Initial Setup Fee: Send a check in the amount of $175 made payable to: Premier Trust, Inc. for the Initial Account Setup Fee.

9. Photo ID: Include a clear copy of your photo ID

***Note** – Pages 3-14 of the **IRA Application** will not need to be printed or returned.

The opening paperwork can be challenging, so if you should have any questions, please don't hesitate to give us a call at (702) 507-0750. We are here to help!

Kindest regards,
Your Premier Trust IRA Team

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