

## Precious Metal Retirement Account Setup

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### Account Holder

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Name \_\_\_\_\_ SS # \_\_\_\_\_ DOB \_\_\_\_\_  
 Address \_\_\_\_\_ Phone # \_\_\_\_\_  
 City / State / Zip \_\_\_\_\_ Email \_\_\_\_\_

### Designation of Beneficiaries

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Name \_\_\_\_\_ SS # \_\_\_\_\_ DOB \_\_\_\_\_  
 Address \_\_\_\_\_ Phone # \_\_\_\_\_  
 City / State / Zip \_\_\_\_\_ Email \_\_\_\_\_  
 Relationship \_\_\_\_\_ % of Share \_\_\_\_\_

### Current Custodian's Information

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Name \_\_\_\_\_ Account # \_\_\_\_\_  
 Address \_\_\_\_\_ Account Rep. \_\_\_\_\_  
 City / State / Zip \_\_\_\_\_ Phone # \_\_\_\_\_

### Asset Liquidation Instructions

Account Description	Quantity in Account	Quantity to be Transferred
_____	_____	_____
_____	_____	_____
_____	_____	_____

This will , will not  close my current Retirement Plan

#### Official Use Only

Account Representative \_\_\_\_\_  
 Account Number \_\_\_\_\_

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Completion of this Form Guarantees Account Setup.

Signature \_\_\_\_\_ Date \_\_\_\_\_