



## PRECIOUS METALS INVESTMENT KIT

*Your complete guide to buy, sell or exchange precious metals within your iPlanGroup account.*

**Important Notice:**

*iPlanGroup does not investigate, sponsor, or endorse any investment product. You assume sole responsibility for the success or failure of your investments. You are responsible for directing the investment of assets in your account. iPlanGroup does not provide any investment advice, or recommend or evaluate the merits or suitability of any investment.*

*If iPlanGroup's services were suggested by a financial representative, such person is not an agent, employee, representative, or affiliate of iPlanGroup. iPlanGroup is not responsible for and is not bound by any representations, warranties, statements or agreements made by any financial representative.*

# PRECIOUS METALS INVESTMENT AUTHORIZATION

Use this form buy, sell or exchange precious metals within your iPlanGroup account.



## 1. ACCOUNT INFORMATION

Account Owner Name		iPlanGroup Account Number:			
Phone Number		Email Address			

\* All email sent to or from the iPlanGroup corporate email system may be retained, monitored and/or reviewed by iPlanGroup personnel.

## 2. BROKER/DEALER INFORMATION

Name of Broker/Dealer		Contact Person Name (if applicable)		
Phone Number	Email Address	Fax Number		
Street Address		City	State	Zip Code

*The dealer listed above must provide an invoice with complete delivery instructions for the investment including: payee quantity, metal type, asset name or description, price per unit, total purchase price, the name and complete address of the payee, and any special instructions regarding the purchase, shipping, and handling of the investment purchase.*

## 3. DEPOSITORY INFORMATION

Depository Name		Contact Person Name (if applicable)		
Phone Number	Email Address	Fax Number		
Street Address		City	State	Zip Code

## 4. PAYMENT OF INVESTMENT PROCESSING FEES (if applicable)

Please indicate below how you would like to pay for any fees associated with this transaction.

Debit fees from my account       Check Enclosed       Charge Credit Card

\*If selecting the Charge Credit Card option, an online payment link will be sent to the E-mail address provided below prior to funding.

E-mail Address: \_\_\_\_\_

**5. FUNDING INSTRUCTION**

THIS INVESTMENT DOES NOT REQUIRE FUNDS (please skip to Section 6.)

**A) REGULAR CHECK**

**B) CASHIER'S CHECK\*** (\$30 Fee)

- via **Regular Mail**
- via **Overnight Mail\* \***  
\$20 Processing Fee + Cost

*Must be sent via Overnight Mail\**

\*\$20 Processing Fee + Cost

**C) WIRE** (\$35 Fee)

**D) ACH** (\$5 Fee)

*Please Note: The ABA Routing Number (requested below) should be obtained from the wire recipients' bank; This number is specifically for wiring funds and may not be the same as the routing number listed on the recipients' checks \**

**CHECK INSTRUCTIONS**

*Only complete if requesting a regular check or cashier's check.*

Check Amount		
\$		
Make Check Payable to (Name) <input type="checkbox"/>		
Mail Check to (Name)		
Street Address (If overnight mail, cannot be sent to a PO Box)		
City	State	Zip Code
Information to be Referenced on Check (if applicable, e.g. Name, Certificate # etc.)		

**WIRE INSTRUCTIONS**

*Only complete if requesting a wire.*

Wire/ACH Amount
\$
Bank Name
ABA Routing Number
Account Number
For Credit to (name on bank account)
For Further Credit to (optional)

**6. ACCOUNT OWNER AUTHORIZATION AND SIGNATURE**

**General.** By executing this Investment Authorization, I, the Account Owner, certify that I have read and understand the terms and conditions contained herein as well as the terms and conditions contained in my original account agreement and disclosures. I understand and agree that all of the following apply:

- (1) My account is self-directed and I, alone, am responsible for choosing any and all investments for my account;
- (2) I have done my due diligence on the investment I am hereby authorizing;
- (3) Neither IRA Partners LLC dba iPlanGroup ("Administrator") nor Fortis Bank ("Custodian") have provided any tax, legal or investment advice concerning the investment authorized herein;
- (4) I understand and agree that alternative investments, including, but not limited to investments in precious metals, real estate, promissory notes, and private equities, may involve a high degree of risk, including the potential loss of the entire investment; that these investments may be non-liquid; that these investments may be difficult to value; that these investments may include restrictions on their subsequent sale or transfer: and that there may be no secondary market upon which to sell these assets; and of
- (5) By executing this Investment Authorization, I hereby direct the Administrator to follow the instructions I have provided herein.

**8. ACCOUNT OWNER AUTHORIZATION AND SIGNATURE (Continued)**

**Responsibilities of Administrator and Custodian.** In processing this transaction Administrator and Custodian are only acting as my agent, and nothing will be construed as conferring fiduciary status on either Administrator or Custodian. I acknowledge and agree that neither Administrator nor Custodian will be liable for any loss of any kind sustained by me or my account which results from my decision to purchase the investment which I am directing with this Investment Authorization (this "Investment"). I understand and agree that, in processing this Investment Authorization, Administrator and Custodian are acting only as my agent and at my explicit direction and that neither Administrator or Custodian have or will be construed as having any fiduciary status by any document or other statement, whether written or oral. I acknowledge that neither Administrator nor Custodian provide tax, legal or investment advice and I warrant and represent that I have received no such advice from either Administrator or Custodian. I certify that I have done my own due diligence investigation regarding the Investment prior to instructing Administrator to make the Investment, and I understand and agree that neither Administrator nor Custodian has reviewed or will review the merits, legitimacy, appropriateness or suitability of this Investment and I further understand and agree that neither Administrator nor Custodian has evaluated or opined regarding the legality of this Investment under any local, state or federal laws and regulations, including securities laws, regulations promulgated by the Internal Revenue Service or rules and regulations promulgated by the Department of Labor. I agree to indemnify and hold harmless both Administrator and Custodian from any and all claims, damages, liability, actions, costs, expenses (including without limitation, attorneys' fees), and any loss to me or my account as a result of any action taken in connection with this Investment or resulting from their serving as Administrator or Custodian for this Investment, including, without limitation, claims, damages, liability, actions, costs, losses or expenses asserted by me.

I understand and agree that (1) if this Investment Authorization and/or any accompanying documentation are not received as complete and in good order or the directions contained therein are, in the sole opinion of Administrator, unclear, Administrator may not process this investment until proper documentation and/or clarification is received, and (2) if there is insufficient undirected cash in my account to fully comply with my instructions to purchase the Investment and to pay all fees associated with the Investment, Administrator will not process the Investment until I provide sufficient funds to Administrator to do so. In either event, the Administrator shall have no liability for any loss of investment, income or appreciation resulting from either of the foregoing situations.

I understand and agree that my account is subject to the provisions of the Internal Revenue Code including, but not limited to Section 4975, which defines certain prohibited transactions. I further understand and agree that neither Administrator nor Custodian has made or will make any determination as to whether this Investment is prohibited under Section 4975 or any other local, state or federal statute or regulation, and that it is my sole responsibility to make such determinations. I hereby warrant and represent that making this Investment will not constitute a prohibited transaction under Section 4975 and that this Investment complies with all applicable laws, regulations and requirements.

I understand and agree that my account may be subject to Unrelated Business Taxable Income (UBTI), and that neither Administrator nor Custodian has made or will make any determination as to whether any asset in my account will generate such income and that it is solely my responsibility to make that determination and, if necessary to file or cause to be filed Form 990-T with the IRS.

I understand that the IRS requires that the assets in my account be valued annually at the end of each calendar year. I agree to provide the Administrator with the year-end valuation for each asset in my account no later than February 15th the following year on a form provided by the Administrator, along with documentation sufficient to corroborate the values I provide.

I understand that certain types of accounts require minimum distributions ("RMD") to be distributed to the account owner when the account owner reaches a certain age. If I am now subject to the RMD rules or will become subject to them while this account is open, I represent that there will be sufficient liquid assets in this account or in other accounts under Administrator's control to meet my RMD requirement. I understand that my failure to make any required RMD may result in a tax penalty of 50% of the amount I should have distributed.

I understand that all communication with Administrator or Custodian regarding this transaction must be in writing and must be signed by me or, alternatively, signed on my behalf by my authorized agent, and that no oral modification of my instructions will be valid or accepted by Administrator.

By signing below, I hereby acknowledge that I have been advised by Administrator to seek the advice of independent legal, tax and investment counsel prior to executing this Investment Authorization, and that it is incumbent upon me to obtain such advice from qualified third parties prior to initiating this Investment. I further acknowledge that the only responsibility Administrator and Custodian have under this Investment Authorization, or otherwise, is to follow my appropriate written instructions as described in this document.

Account Owner/Responsible Individual Authorization and Signature		
	Print Name	Date
<b>X</b>		