



1105 State Route 121 North, Suite B
 P.O. Box 870 ■ Murray, KY 42071
 Office: 270.226.1000 ■ Fax: 270.226.1001
 TF: 888.753.6972 ■ KingdomTrust.com

Account Transfer

For Custodial Accounts

SECTION 1 - Account Holder Information

First Name: MI: Last Name:

Social Security Number: Date of Birth: Kingdom Trust Account Number:

Address:

City: State: Zip Code:

Daytime Phone Number: Email Address:

Kingdom Trust Account Type: Individual Joint Trust Business

SECTION 2 - Releasing Custodian Information

Company: Contact:

Address:

City: State: Zip Code:

Phone Number: Account Number (with Releasing Custodian):

PLEASE ENCLOSE THE MOST RECENT STATEMENT FROM THE ACCOUNT BEING TRANSFERRED

SECTION 3 - Transfer Instructions

Directly transfer all or part of my present account with your organization in the manner indicated below:

Accepting Organization Name: Participant Name:

Kingdom Trust Account Number: Date First Participated: *(To be completed by present custodian/trustee)*

Type of Account Being Transferred: Individual Joint Trust Business

Transfer the assets in the manner prescribed below:

Asset Description	Quantity in Account	Quantity to Transfer	Liquidate Immediately (Y/N)	Transfer as Cash In Kind	
				as Cash	In Kind
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

This Will (check one) Completely Transfer (and Close) My Current Account Partially Transfer My Current Account

I am aware that penalties may be incurred if time deposits are liquidated prior to their maturity date.

SECTION 4 - Delivery Instructions

Indicate how your current custodian should send funds and re-registration paperwork to Kingdom Trust by choosing one of the options below.

Delivery Options for Check Payments/Wire Transfers

- | | | |
|--------------------------------------|---|---|
| <input type="checkbox"/> Wire | <input type="checkbox"/> Overnight Check (FedEx or UPS)
Kingdom Trust
1105 State Route 121 N., Suite B
Murray, KY 42071 | <input type="checkbox"/> Mail Check (U.S. Postal Service)
Kingdom Trust
P.O. Box 870
Murray, KY 42071 |
|--------------------------------------|---|---|

When sending a check, whether through regular mail or overnight delivery, please be aware that funds will not be available for 2 days after the deposit has been made. **Please make check payable to "The Kingdom Trust Company, Custodian, FBO Account Holder's name, Account Number."**

Delivery Options for Re-Registration Paperwork

- | | |
|---|---|
| <input type="checkbox"/> Overnight Paperwork (FedEx or UPS)
Kingdom Trust
1105 State Route 121 N., Suite B
Murray, KY 42071 | <input type="checkbox"/> Mail Paperwork (U.S. Postal Service)
Kingdom Trust
P.O. Box 870
Murray, KY 42071 |
|---|---|

SECTION 5 - Depository Options

This section is required if transferring precious metals.

Please choose a depository option by checking the box immediately to the left of the Depository you wish to use (and doing the same for a specific location, if applicable). Once you have made your election(s), please choose whether you wish to have your metals stored in a non-segregated manner (aggregated together with the metals owned by other Kingdom Trust account holders) or in a segregated manner (stored separate from the metals owned by other Kingdom Trust account holders but still within the storage space leased to Kingdom Trust) by checking the box immediately to the left of your choice, if applicable.

- | | | |
|--|---|---|
| <input type="checkbox"/> Brinks Global Services* <ul style="list-style-type: none"> <input type="radio"/> California: 1120 W. Venice Blvd., Los Angeles, CA 90015 <input type="radio"/> New York: 184-45 147th Ave., Springfield Gardens, NY 11413 <input type="radio"/> Utah: 2179 S. 300 W., Ste. 4, Salt Lake City, UT 84115 | <input type="checkbox"/> Non-Segregated Storage | <input type="checkbox"/> Segregated Storage |
|--|---|---|

- | | | |
|---|---|---|
| <input type="checkbox"/> Delaware Depository 3601 North Market St., Wilmington, DE 19802 | <input type="checkbox"/> Non-Segregated Storage | <input type="checkbox"/> Segregated Storage (Gold Only) |
|---|---|---|

- | | |
|---|--------------------------------|
| <input type="checkbox"/> First State Depository 100 Todds Lane, Wilmington, DE 19802 | SEGREGATED STORAGE ONLY |
|---|--------------------------------|

- | | | |
|---|---|---|
| <input type="checkbox"/> International Depository Services (IDS) <ul style="list-style-type: none"> <input type="radio"/> Canada: 3300 Caroga Dr., Mississauga, ON, Canada L4V 1L4** <input type="radio"/> United States: 406 West Basin Rd., New Castle, DE 19720 | <input type="checkbox"/> Non-Segregated Storage | <input type="checkbox"/> Segregated Storage |
|---|---|---|

Sub-Account Number:

IF TRANSFERRING IN-KIND, A STATEMENT OF CURRENT METALS HOLDINGS MUST BE PROVIDED

* There will be a handling charge of \$25.00 per package for all material moved out of a Brinks account.

** In Ontario the Canadian government imposes a 13% Goods and Service Tax/Harmonized Sales Tax (GST/HST) on products entering Canada which do not meet a minimum purity requirement.

THIS SPACE INTENTIONALLY LEFT BLANK

SECTION 6 - General Provisions & Signatures

1. If I have chosen a Depository above, I acknowledge that I, as the Account Holder, am also solely responsible for choosing the Depository in which the metals purchased are stored. I also warrant that I have performed the due diligence I deemed necessary on the Depository I have chosen. I also warrant that neither Kingdom Trust nor any of its employees or agents has made any representations or recommendations to me concerning the Depository I have chosen other than to advise me to perform my due diligence on any Depository I might consider.
2. I acknowledge that Kingdom Trust is acting solely as a directed custodian and represent that it provided no tax, legal or investment advice.
3. I have reviewed and hereby consent to the Kingdom Trust Fee Schedule.
4. If transferring metals, I understand that all metals I direct to be transferred to my account through Kingdom Trust will be stored at the Depository I have selected in Section 5 above and hereby agree to said storage. I agree that the Depository I selected shall be solely responsible for the storage and safekeeping of all precious metals in my account.
5. I hereby indemnify and hold Kingdom Trust harmless from any and all damages arising from or in connection with this Account Transfer.

Participant's Signature: Date: Participant's Printed Name: **Medallion Stamp (If Required)***

** A medallion guarantee is only required when the asset being transferred is a security.*

Accepting Organization - Our organization agrees to serve as the new custodian or trustee for the IRA account of the above-named individual, and as custodian or trustee, we agree to accept the assets being transferred.

New Custodian or Trustee: EIN Number: Address: City: State: Zip Code: Authorized Signature for Accepting Organization: Date: