GOLDSTAR TRUST COMPANY

IRA TRANSFER REQUEST

(Incoming into GoldStar)

P. O. Box 719
Canyon, TX 79015
(800) 486-6888
Fax (806) 655-2490
forms@goldstartrust.com

PART 1. GOLDSTAR ACCOUNT INFORMATION

Name _____ GoldStar Account No. _____

Social Security No. _____ Date of Birth _____

PART 2. TELL US ABOUT THE ACCOUNT YOU ARE TRANSFERRING

Delivering Firm _____ Phone Number _____

Mailing Address _____

Delivering Firm Account No. _____ Fax Number _____

☐ Traditional ☐ SEP ☐ Simple ☐ Roth ☐ Direct Rollover* ☐ Other _____

*To initiate a direct rollover from an employer-sponsored retirement plan (401K, 403B, GOV 457, Pension, etc.) contact your plan administrator.

A STATEMENT FROM THE DELIVERING FIRM MUST BE PROVIDED TO TRANSFER INTO GOLDSTAR TRUST COMPANY.

☐ Full Liquidation & Transfer of Entire Account ☐ Partial Transfer $_____
(Cash amount or list the assets below for In-Kind)

☐ Full In-Kind Transfer

Asset Description *(In-Kind only)*	Quantity or Amount to be Transferred

PART 3. DELIVERY INSTRUCTIONS - SELECT ONE

GoldStar Registration FBO _____
Client Name Account No. Account Type

☐ Wire Funds *(fees may apply)*	☐ Overnight Funds *(fees may apply)*	☐ Regular Mail	☐ In-Kind Registration *(Securities)*
Happy State Bank, a division of Centennial Bank 620 Chestnut, Conway, AR 72032 Routing Number: 082902757 Account Number: 6002000773 Further Credit: GoldStar Trust Company (client's name and account number)	GoldStar Trust Company 1401 4th Avenue Canyon, Texas 79015	GoldStar Trust Company P.O. Box 719 Canyon, Texas 79015	GoldStar Trust Company FBO: (client's name and account type) Tax ID: 88-1312583 It is the policy of GoldStar Trust Company ("GoldStar") to only accept securities that have been re-registered to GoldStar prior to transfer. Any securities received that have not been re-registered to GoldStar will be returned to the current custodian for re-registration prior to acceptance.

PART 4. CUSTOMER SIGNATURE

Transfers Only: I authorize the transfer of IRA assets in the manner described above and certify that all the information provided by me is correct and may be relied upon by GoldStar Trust Company. I understand that I am responsible for determining my eligibility to transfer within the limits set forth by tax laws, related regulations and plan agreements. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree GoldStar Trust Company shall in no way be held responsible.

Direct Rollovers Only: I understand the rules and conditions applicable to direct rollovers and certify that I qualify for a direct rollover of the funds or assets listed above. Due to the important tax consequences of rolling funds over to an IRA or other qualified plan, I have been advised to see a tax advisor. I hereby request payment from the plan designated above in the form of a direct rollover. I assume full responsibility for this direct rollover transaction and will not hold GoldStar Trust Company or the plan administrator of either the distributing or receiving plans liable for any adverse consequences that may result. I hereby irrevocably designate this contribution of the funds and/or property indicated above as a direct rollover contribution.

X _____
Physical Signature Required Date *(mm/dd/yyyy)*

PART 5. GOLDSTAR LETTER OF ACCEPTANCE

GoldStar Trust Company agrees to serve as the new custodian for the account of the above–named individual, and as Custodian, we agree to accept the assets being transferred.

X _____
Authorized Signature for GoldStar Date *(mm/dd/yyyy)*

Signature Guarantee: Check with your current custodian to determine if a Medallion Stamp Guarantee is required. This is NOT a requirement of GoldStar Trust Company.