



1. IRA HOLDER'S NAME AND ADDRESS				2. CURRENT TRUSTEE OR CUSTODIAN NAME AND ADDRESS			
First Name	MI	Last Name		Custodian Name			
Address				Address			
City		State	Zip	City		State	Zip
Social Security Number		Date of Birth		Account Number		Phone	
Home Phone				Type <input type="checkbox"/> Traditional <input type="checkbox"/> Roth <input type="checkbox"/> 401k <input type="checkbox"/> Simple <input type="checkbox"/> SEP <input type="checkbox"/> _____			
3. TRANSFER INSTRUCTIONS				4. CASH HANDLING INSTRUCTIONS			
Transfer Amount		<input type="checkbox"/> All <input type="checkbox"/> Partial		Wire Transfer: Bank Name: Wells Fargo			
Frequency		<input type="checkbox"/> Once <input type="checkbox"/> Other		Account #: 3393886381			
Cash Transfer Method		<input type="checkbox"/> Check <input type="checkbox"/> Wire		Routing #: 121000248			
Transfer To Account Type (Receiving account)		<input type="checkbox"/> Traditional <input type="checkbox"/> ROTH <input type="checkbox"/> 401k <input type="checkbox"/> Simple <input type="checkbox"/> SEP <input type="checkbox"/> _____		Account Name: American Estate & Trust			
				FCC/FBO: Account #, First Last			
				Check Transfer: See page 2			
5. ASSET HANDLING INSTRUCTIONS							
Asset Description				Qty or Amount to be transferred		Transfer In Kind	
1. Cash						Transfer In Kind	
2.						Transfer In Kind	
3.						Transfer In Kind	
6. SIGNATURE				7. ACCEPTING IRA CUSTODIAN			
<p>I authorize the transfer of the IRA assets in the manner described above and certify that all of the information provided by is correct and may be relied upon by the Trustee or Custodian.</p> <p>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. Further, I understand that a transfer from a SIMPLE IRA to SIMPLE IRA on a more frequent basis than monthly from a Designated Financial Institution, change in my transfer request outside my election period, may result in costs or penalties. I understand that special rules apply to SIMPLE IRA to Traditional IRA transfers. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree that the Trustee or Custodian shall in no way be held responsible.</p>				<p>American Estate & Trust, Inc. agrees to serve as the new custodian for the account of the above named individual. We agree to accept the assets being transferred.</p> <p>Account Identification of Accepting IRA:</p> <p>Account Type being accepted: <input type="checkbox"/> Traditional <input type="checkbox"/> ROTH <input type="checkbox"/> SEP <input type="checkbox"/> Simple <input type="checkbox"/> 401k <input type="checkbox"/> _____</p> <p>Accepting Custodian Address: American Estate & Trust, Inc. 6900 Westcliff Dr.; Ste. 603 Las Vegas, NV 89145 Phone: (866) 654- 6111 Fax: (702) 974- 2524 Email: transfers@aetrust.com</p>			
<p><i>Place Medallion Signature Here</i></p>							
<p>Please note that you should contact your current IRA custodian to determine if a medallion stamp is required.</p>							

Receiving Firm	Check Transfer	Wire Transfer
American Estate & Trust, Inc. 6900 Westcliff Dr., Ste 603 Las Vegas, NV 89145 Dept: Transfer Requests P: 1-866-654-6111 E: transfers@aetrust.com TIN: 20-8936642	Payee Name: American Estate & Trust, Inc. FBO First Last Reference: Account Number, First Last Mail To: American Estate & Trust, Inc. 6900 Westcliff Dr., Ste 603 Las Vegas, NV 89145 Attn: Transfer Requests	Bank Name: Wells Fargo Account #: 3393886381 Routing #: 121000248 Account Name: American Estate & Trust FCC/FBO: Account Number, First Last
<u>NO LIQUIDATIONS OF ASSETS AUTHORIZED</u> This transfer is not requesting or authorizing the sale, or liquidation of ANY ASSETS currently held in the account under your custody. As the current custodian, you acknowledge any asset dispositions are being done under your own authority and or at the direction of the account holder, and that we are not authorizing or requesting any such action.		
Asset Type: Metals	Ship To: DDS 3601 North Market Street Wilmington, DE 19802 Packaging Requirements: Metals for different accounts or clients must be separately packed and labeled. Metals can have over pack. Any sub packages must be labeled as to the client and account. Labeling Requirements: All metals must be identified as: "American Estate & Trust, Inc. FBO Account Number - First Last " Insurance: Proper Insurance should be used and the cost will be paid by the shipper.	
Asset Type: Foreign Currency	Ship To: DDS 3601 North Market Street Wilmington, DE 19802 Packaging Requirements: Metals for different accounts or clients must be separately packed and labeled. Metals can have over pack. Any sub packages must be labeled as to the client and account. Labeling Requirements: All metals must be identified as: "American Estate & Trust, Inc. FBO Account Number First Last " Insurance: Proper Insurance should be used and the cost will be paid by the shipper.	
Asset Type: Paper Assets	Ship To: American Estate & Trust, Inc. 6900 Westcliff., Ste. 603 Las Vegas, NV 89145 Reference: Account Number First Last	