



A Division of Equity Trust Company

# Sterling Trust

# PRECIOUS METALS DIRECTION OF INVESTMENT FORM



## INSTRUCTION AND GUIDELINES

Use this form in conjunction with the invoice provided by the Dealer to instruct Sterling Trust to process purchases, liquidations or exchanges of precious metals within your Sterling Trust account. Such investments include:

- American Eagle gold, silver and platinum coins.
- Other coins as allowed under Internal Revenue Code Section §408(m)(3).
- Other precious metal products that meet the minimum fineness requirements and are manufactured by a NYMER or COMEX approved refiner/assayer.

Please do not use this form to authorize investment transactions in publicly-offered investments, private stocks, private limited partnerships, private LLCs, promissory notes, trust deeds, real estate contracts, real estate or other privately-offered or nonstandard assets.



## SUBMISSION OPTIONS

**OVERNIGHT:**

Sterling Trust  
7901 Fish Pond Road  
Waco, TX 76710

**REGULAR MAIL:**

Sterling Trust  
P. O. Box 2526  
Waco, TX 76702-2526



## CONTACT INFORMATION

**MAILING ADDRESS:**

Sterling Trust  
P. O. Box 2526  
Waco, TX 76702-2526

**PHYSICAL ADDRESS:**

7901 Fish Pond Road  
Waco, TX 76710

**For assistance, please contact a Client Services Representative at:****Phone:**

800-955-3434 (Option 2)  
254-751-1505 (Option 2)

**Fax:**

254-751-0872

**Website:**

[www.SterlingTrustCompany.com](http://www.SterlingTrustCompany.com)

**Or e-mail questions to:**

[IRAServices@SterlingTrustCompany.com](mailto:IRAServices@SterlingTrustCompany.com)



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E-MAIL: IRAServices@SterlingTrustCompany.

PLEASE PRINT CLEARLY. A DELAY IN PROCESSING MAY OCCUR IF INSTRUCTION IS UNCLEAR.

1 LIST YOUR RETIREMENT ACCOUNT INFORMATION

ACCOUNT HOLDER NAME: ACCOUNT NUMBER:
EMAIL ADDRESS: DAYTIME PHONE NUMBER: FAX NUMBER:

2 HOW DO YOU WANT THIS INVESTMENT PROCESSED? (FOR PURCHASES ONLY - CHECK ONE OPTION)

- OPTION #1 EXPEDITED PROCESSING SERVICE\* (\$50.00)
OPTION #2 NORMAL PROCESSING SERVICE
\*Although the feature does not guarantee same day service, it does guarantee that your request will be processed before other non-expedited requests.

3 PURCHASE

Per the attached invoice, if investment is a new or additional purchase, I authorize and direct Sterling Trust to fund this investment purchase in the following manner:

Table with 3 columns: Specific Holding Purchased, Quantity, Amount. Includes a Total row.

Make purchase check payable and send check to:

PAYEE NAME: PHONE:
MAILING ADDRESS:
CITY: STATE: ZIP CODE:

Wire funds to the following: (\$30.00 Domestic/\$50.00 International)

BANK NAME:
BANK PHONE NUMBER: ABA ROUTING NUMBER:
FOR CREDIT TO: ACCOUNT NUMBER:

(Additional wire fee will be charged if wire is rejected due to incorrect or incomplete information)

