PREFERRED TRUST

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IRA LLC Re-Titling Form

Traditional | Roth | SEP | SIMPLE

PTC IRA Account Number ______

Congratulations on opening an IRA, LLC! Now it is time to re-title the investment(s) to the name of the IRA LLC to provide you the maximum flexibility to manage your investment(s). The next step is to request Preferred Trust Company to re-title the investment(s) you intend to hold in the IRA LLC by completing the IRA LLC Re-Titling form. Currently the investment(s) is titled under Preferred Trust Company Custodian FBO [your name], [IRA type] and the completion of the re-titling will be under [IRA LLC name]. This requires Preferred Trust Company as your Custodian to re-title the investment(s). The re-titling requirements will vary by investment type. The Investment Department at Preferred Trust Company will work with you to ensure each investment is re-titled in compliance with IRS rules and regulations.

SECTION 1 | IRA Account Owner Information

First Name ______ Last Name ______ Last 4 Digits of SSN ______ DOB (MM/DD/YY) ______

Daytime Phone Number ______ Email Address ______

SECTION 2 | IRA LLC Information

IRA, LLC Investment Name ______

SECTION 3 | Asset Information to be Retitled

The investment name can be found by logging into the Preferred Trust Company client portal at www.preferredtrustcompany.com.

Investment Name ______ **RE-TITLING FEE**: The Re-Titling Fee ($**100** to $**200**) will be assessed per investment based on processing time/cost associated.

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SECTION 4 | Acknowledgment Signature

I direct Preferred Trust Company as Custodian to re-title my IRA assets as set forth at my direction on this form. I understand I should seek the guidance of a tax or legal professional with regard to this decision. I understand that Preferred Trust Company as Custodian cannot provide tax or legal advice. I indemnify and agree to hold Preferred Trust Company as Custodian harmless against any liabilities I assume for the consequences of this re-titling decision.

Signature of IRA Account Owner ______ Date ______