

# IRA Direction of Investment Form

## 1 IRA OWNER INFORMATION

|      |                        |
|------|------------------------|
| NAME | ACCOUNT NUMBER         |
|      |                        |
|      | SOCIAL SECURITY NUMBER |
|      |                        |

## 2 PURCHASE INSTRUCTIONS

I instruct you to purchase the following investments:

| DESCRIPTION        | QUANTITY OR MATURITY | COST OR AMOUNT |
|--------------------|----------------------|----------------|
|                    |                      |                |
| Other Information: |                      |                |

## 3 SALE INSTRUCTIONS

I instruct you to sell the following assets in my IRA:


| DESCRIPTION        | QUANTITY OR MATURITY | AMOUNT |
|--------------------|----------------------|--------|
|                    |                      |        |
| Other Information: |                      |        |


## 4 COST OF TRANSACTIONS *(Financial Organization Use Only)*

- (1) Gross Amount           \$
- (2) State Tax                \$
- (3) Commission             \$
- (4) Other                     \$
- (5) SEC/Fee                 \$
- (6) Net Amount             \$

## 5 SIGNATURES

I agree that all contributions and existing balances shall be invested according to my sole discretion. I agree not to hold the custodian/trustee liable for any investment decisions or recommendations with respect to the investment, reinvestment, or sale of assets in the custodial account. I acknowledge that the custodian/trustee is not responsible for reviewing my assets held in the custodial account and that the custodian/trustee shall not be responsible for questioning any of my investment decisions. I release, indemnify and hold harmless the custodian/trustee from any liability resulting from failure to act because of the absence of instructions from me. If any instructions are unclear, I understand that the custodian/trustee cannot act until the instructions are clarified. Pending clarification, the custodian/trustee shall hold without investing all or any portion of the contribution, without liability for loss of income or appreciation and without liability for interest or dividends.

 X  
 IRA Owner's Signature \_\_\_\_\_ Date \_\_\_\_\_

 X  
 Custodian/Trustee's Signature \_\_\_\_\_ Date \_\_\_\_\_