

# 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.



IRA Owner's Signature

Date



Custodian/Trustee's Signature

Date