



6900 Westcliff Dr.; Ste 603
 Las Vegas, NV 89145
 Fax(702) 974-2524
 Toll Free (866) 654-6111
info@TrusteeAmerica.com
www.iracentral.com

Direction of Investment



1. Account Holder's Name and Address			2. Social Security No
Full Name:			
Mail Address:			3. Account Type <input type="checkbox"/> IRA/SEP/Roth <input type="checkbox"/> 401(k) <input type="checkbox"/> Simple <input type="checkbox"/> ESA <input type="checkbox"/> HSA <input type="checkbox"/> Trust <input type="checkbox"/> Other:
City:	ST:	Zip:	
4. Acct. No.			

5. Investment Direction		6. Un-Invested Cash
a. Buy/Sell Direction (check one):	<input type="checkbox"/> Buy <input type="checkbox"/> Sell	<input type="checkbox"/> Quick Access Money Account w/Interest ¹ <input type="checkbox"/> Bank Account w/o Interest ²
b. Asset Description/Name/ID		
c. Dollar Amount		
d. Units		

7. Special Instructions	8. Signature
	<p>I understand that all investment decisions, including due diligence requirements, are mine, and mine alone. I understand that my account with American Estate & Trust, LC (AET) is completely self-directed and that AET does not and has not recommended any specific investment or decision to me. I understand that the uninvested cash options listed by AET are presented for informational purposes only, not as a recommendation or an endorsement or solicitation of an investment or security. I understand that all investment decisions are subject to all applicable Federal and state laws, and to the regulations and policies of AET, including any current and/or future laws, regulations and policies. I certify that I have read all of the disclosures and the information provided and that all information provided by me is correct and may be relied upon by American Estate & Trust, LC.</p> <p style="text-align: center;"> _____ (Account Holder) </p> <p style="text-align: center;"> _____ (Date) </p>

¹ By default, all client account money received at American Estate & Trust, LC (AET) is automatically placed in a *Quick Access Money Account* until or unless the client directs that some or all the Account's funds be invested, paid or moved elsewhere. The Account is an AET managed account invested in a mix of high quality fixed income securities. The Account holds your money, held for you by AET, and generally pays above-market interest rates to your account. Principal (cash) withdrawal requests are normally fulfilled within 24 hours (72(t) IRA payments are made only according to a pre-arranged schedule). When you open a new account, AET immediately sends a notice stating the current interest rate. The rate is also available by phone or email request to AET, and it will be listed on your online and monthly account statements.

AET's active management of your Quick Access Money Account seeks to maintain and return 100% of your principal. Opening a Quick Access Account involves risks. The Account is not FDIC insured. The safety of principal and the return of interest are backed only by the underlying investments and earnings of the account. The underlying assets and earnings may lose value due to market fluctuations. AET assumes no liability for losses in the underlying investments of your Account
 AET's fees for managing your Account do not come out of your principal, or your stated yield. AET's management fees are: Any and all Account earnings which are above the amount needed to pay your stated yields. If there are no earnings above your stated yield, then AET collects no fees.

² Money which you wish to leave in a bank account will be held by AET at well managed and capitalized bank of our choosing. The account will have FDIC protection up to the normal and current FDIC insurance limits. Any and all interest earned in the account is retained by AET as its management fee. Your account will receive no interest from this bank account.



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Instructions

Before proceeding with any investment involving your account, be sure to consult with your independent advisors regarding the suitability, legality and taxation of any desired investment. There are many rules involving various investment types and AET is not responsible for your due diligence. In the case of retirement plan investments, pay careful attention to any contract you sign as part of your investment to ensure the contract does not cause your plan to become disqualified (prohibited pledging of IRA assets, use of margin accounts, personal guarantees, etc).

Section 1: Fill in name and address as it appears on your account

Section 2: Social Security Number

Section 3: Select your account type

Section 4: Your account number with American Estate & Trust

Section 5: Fill in this section if you are buying or selling and investment.

Section 5.a – Select buy or sell option

Section 5.b – List asset name or identification

Section 5.c – List the dollar amount for this transaction

Section 5.d – List the number of units that may be associated with this asset transaction

Section 6: You can pick either of the two un-invested cash options. By default, your cash goes into the Quick Access Account per your account agreement. Leaving this blank will not override any prior direction or choices.

Section 7: Special Instruction – This section is used to provide any wiring or check writing instructions or any other relevant transactional instructions.

Wiring Instructions: provide the following:

- Bank Name
- Account Name
- Bank routing ID
- Account Number

Check Writing Instructions:

- Payee
- Mailing address

Section 8: Sign and date

Transmittal of this form: This form can be mailed, faxed or sent as an email attachment.

Email: info@trusteeamerica.com

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