Preferred Trust Company, LLC

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Investment Invoice Authorization and Direction Form

Completed by IRA Owner

Prior to directing Preferred Trust Company to process your investment instructions, please be sure that the issuer or sponsor of your investment has provided Preferred Trust Company with a complete Sponsor / Investment Notification Form and related materials. If the sponsor has not provided that information to Preferred Trust, your investment instructions may be delayed.

By signing this form, you acknowledge that Preferred Trust Company has not reviewed, recommended or commented on the investment merits, risks, suitability or management of investment(s) you have selected, and you authorize Preferred Trust Company to process the following transaction.

1. IRA Owner Information

Last Name ______ First Name ______ Initial ______

Phone Number ______ Email ______

Account Number ______

2. Investment Information

Name of Investment Asset ______

◯ I authorize Preferred Trust Company to withdraw fees from my IRA account for this payment.

Initial ______ Transaction and/or account maintenance fees may be deducted from the final placement amount of transactions if such fees are not available for withdraw from PTC accounts. In such instances, the final placement amount will be net of such fees and may result in a lower placement amount.

Total Amount to be Paid $ ______

3. Direction Information

Please note an $8 Check Fee and a $12 Invoice Processing Fee will be applied to your account. Please provide the following information to ensure accurate and timely payment of your request:

Check Payee Name ______

Mail Payment to: ______

Wire Instructions - Please note a $40 wire transfer fee will be applied to your account. Please provide the following information to ensure accurate and timely funding of your request:

Bank Name ______ Recipient Name ______

Bank Phone ______ Bank Address ______

Route Number ______ Account Number ______

4. Signature

By signing below you acknowledge that Preferred Trust Company does not perform any type of due diligence determination for any investment or background review of the the company offering this investment. You verify that you have consulted with tax, financial and legal professionals, or have elected not to do so prior to directing Preferred Trust Company to make this payment on behalf of your account. You verify that you have received and read all pertinent information relating to the payment named herein.

Signature of IRA Owner ______ Date ______