

Direction of Signature

1 Account Information	
Your Name:	Account Number:
Email:	Phone Number:

2 Processing Preference	
<input type="checkbox"/> Normal Processing Service: <i>(No Charge)</i> <i>(Normal processing time is typically 3 business days unless corrections are required.)</i>	<input type="checkbox"/> Expedited Processing Service: (\$95.00) <i>(Expedited processing is typically one business day unless corrections are required.)</i>

3 Asset Information	
<i>Custodian and/or Administrator can only sign documents for assets that already exist in your Custodial Account. Please provide the Asset Reference Number and description below that corresponds with the documents listed in section 5.</i>	
Asset Reference Number: <i>(RE*#####, example)</i>	Asset Description:

4 Document Titling Instructions	
Ensure all documents list the account as: “New Vision Trust Custodian FBO (client name) (account type)”	
Example- “New Vision Trust Custodian FBO JOHN SMITH ROTH IRA”	
* If the IRA is partnering:	
Example- “New Vision Trust Custodian FBO JOHN SMITH ROTH IRA__% and New Vision Trust Custodian FBO JANE SMITH Traditional IRA__%”	

5 Document Requiring Signature	
<i>Each document to be signed by the Custodian and/or Administrator must be listed individually, by name.</i>	
1)	2)
3)	4)
5)	6)

6 Delivery Instructions	
<i>How would you like the signed documents sent?</i>	
<input type="checkbox"/> Fax:	
<input type="checkbox"/> Email:	
<input type="checkbox"/> Mail To:	
<input type="checkbox"/> Certified Mail <input type="checkbox"/> Overnight Mail <input type="checkbox"/> Regular USPS Mail	
Address:	City: State: Zip Code:

7 Signature and Acknowledgement	
<small>By my signature below, I confirm that I have read and consent to the terms of this document and I further acknowledge that I have read and consent to the terms of the New Account Application, Custodial Agreement (Form 5305, 5305-A, 5305-RA, 5305-SA, 5305-SEP, 5305-C or 5305-EA, as application, “collectively referred to as “5305” or 401K Plan Agreement (“Sponsored Plan”) as applicable, Fee Schedule, Account Disclosure Statement and any other documents that govern my Custodial Account or Sponsored Plan, as such documents are currently written, or as they may be amended from time to time, (the “Documents”), which are incorporated by reference herein. (In the event of a conflict between the Documents and the 5305 and/or Sponsored Plan applicable to my Custodial Account, the 5305 or Sponsored Plan shall govern).</small>	
Print Name: _____	
Signature: _____	Date: _____