



# INSTRUCTION FOR INVESTMENT

(Or other required action)

I, \_\_\_\_\_ do hereby certify that I am the accountholder, grantor or duly authorized agent for the accountholder of IRA # \_\_\_\_\_ and in accordance therewith, I hereby direct Sunwest Trust Inc. to engage in the following actions. Please describe exactly what actions you want taken in as much detail as possible, what you want signed, where to send docs, et cetera.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I hereby certify that I am aware of the restrictions placed on IRA accounts under the internal revenue code, including but not limited to sections 4975, 408 and 408b. I understand that it is my responsibility to seek guidance from a competent licensed tax or legal professional and that Sunwest Trust Inc. is under no duty to question, review, approve, or provide any guidance with relation to the IRA transaction. I understand that Sunwest Trust Inc. can at any time decide that it is not administratively feasible to engage in a specific action or transaction, based solely on Sunwest Trust's internal management decisions.

Payment Instructions (if applicable) Please send \$ \_\_\_\_\_, in the form of a:

Check payable to: \_\_\_\_\_

Mail check to: \_\_\_\_\_  
\_\_\_\_\_

Wire to: Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_

Bank Account Name: \_\_\_\_\_ Account #: \_\_\_\_\_

Swift code (if required): \_\_\_\_\_

I understand that my election shall remain in effect until specifically revoked, or upon the passing of 60 days. **The processing time is at least 3 business days from the time correct and complete documentation has been received and funds are available if applicable.**

Signed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ year.  
Month

Signature of accountholder \_\_\_\_\_

Custodian Acknowledges receipt this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ year.  
Month

Custodian Signature \_\_\_\_\_