



Interested Party Authorization / Update

Please complete the information below if authorizing an Interested Party (IP), including, but not limited to, broker, financial planner, accountant or attorney to receive information about your account. **Please note that this individual will have limited access to your Account information. An Interested Party does not have authority to make investment decisions, direction of investments or changes to your Account.** As the Custodian, Directed Trust Company will not act on any instructions from this Individual.

Those who are designated as an IP by the Account Owner may not be a sponsor of, or otherwise affiliated with an investment in the Account. It is the responsibility of the Account Owner and the IP to review the Account assets to ensure compliance with this provision and to take steps to remove an IP from the Account in the event of non-compliance.

This form authorizes Directed IRA to provide account information and electronic statements to the individual referenced below. If the IP is associated with a broker-dealer, financial exchange or regulated investment advisory firm, Directed IRA may make information about Account Activity available to the broker-dealer, exchange or compliance office for the advisory firm as they deem necessary to receive such information.

1. Account Owner Information

First Name: _____ MI: _____ Last Name: _____
Last 4 of SSN: _____ Date of Birth: ____ / ____ / ____ Phone Number: _____
Directed IRA Account Number: _____ Account Type: _____

2. Elections

- I would like to **designate a new** Interested Party to my account. Existing IP(s) listed will remain authorized on Account.
- I wish to **remove** any existing Interested Party authorized on my account and **replace** with the new IP listed below.
- I wish to **remove** the IP information listed below. No new IP will be authorized at this time.

3. Interested Party Information

Name (First, MI, Last): _____ Firm Name (If applicable): _____
Mailing Address: _____
City: _____ State: _____ Zip: _____
Phone No.: _____ Fax No.: _____ Email Address: _____

Account Authorization: (Check all that apply)

- Discuss my Account via phone, email or fax
- Receive Account Notifications via email (*email address required above*)
- View my Account online Receive electronic statements
- Receive Paper Statement. (*mailing address required above*) *Paper Statement Fee will be applicable. See Fee Schedule.*

4. Account Owner Authorization

I understand that I may revise the Interested Party information at any time by giving written notice to Directed IRA. I understand that the Interested Party designated above does not have authority to make investment decisions, direction of investments, nor can they make any changes to my account. Directed IRA will only share information of Account as elected by Account Owner in Section 3 above. I agree to release, indemnify, defend and hold Directed IRA harmless.

➤ _____
Account Owner Signature _____ Date _____

INVESTMENTS: NOT FDIC INSURED ■ NO GUARANTEE ■ MAY LOSE VALUE

Email Forms to: Clients@directedira.com	Send Mail to: 3033 N. Central Ave. Ste. 415 Phoenix, AZ 85012	Fax: 602-899-9641	Questions? (602) 899-9830 Clients@directedira.com
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Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation