

## Credit Card Authorization / Payment Preference Update

### IMPORTANT INFORMATION

Use this form for one of the two following reasons:

- i. You would like to update the credit card on file with Directed Trust Company.
- ii. To begin paying all account fees by credit card instead of using the available cash in your account.
- iii. To begin paying all account fees from the available cash in your account instead of using the credit card on file.

Be advised that a minimum cash balance of \$500 must be maintained at all times. (Please see Custodial Account Agreement and Fee Schedule for more information on Billing and Fee Collection)

### 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. Fee Payment Preference Update

<input type="radio"/> <b>Update Credit Card on File</b> All account fees will be charged to this Credit Card.	<input type="radio"/> <b>Add New Credit Card</b> This will change fee preference from "Deduct fees from account", to charge to Credit Card.	<input type="radio"/> <b>REMOVE credit card on file</b> This will change fee preference from, "Charge to Credit Card" to, "Deduct fees from account".
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<b>Credit Card Information</b>
Card Type: <input type="radio"/> VISA <input type="radio"/> MasterCard <input type="radio"/> AMEX <input type="radio"/> Discover
Name on Card: _____
Card Number: _____ Exp. Date: _____/_____/_____ CVV Code: _____
Billing Address: _____
City: _____ State: _____ Zip Code: _____

➤ Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Directed Trust Company (OFFICE USE ONLY)**

Method:  Phone  Email

Updated by DTC Employee: \_\_\_\_\_ Date: \_\_\_\_\_

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

<a href="http://www.directedira.com/secureupload">Secure File Upload</a>	Email Forms to: <a href="mailto:Billing@directedira.com">Billing@directedira.com</a>	Send Mail to: 3033 N. Central Ave. Ste. 415 Phoenix, AZ 85012	Phone: (602) 899-9396 Fax: (602) 899-9641
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Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation