



IMPORTANT! CONTACT YOUR CURRENT PLAN ADMINISTRATOR TO SEE IF THEY REQUIRE THEIR OWN PAPERWORK

GOLDSTAR IRA ACCOUNT OWNER

Name: _____ SS #: _____ Date of Birth: _____
Address: _____ Daytime Phone #: _____
E-mail: _____

CURRENT IRA OR QUALIFIED PLAN INFORMATION

Please provide a copy of a recent statement from your current IRA custodian or employer retirement plan.

Custodian's Name: _____ Account #: _____
Custodian's Address (physical if overnight): _____
City, State, & Zip _____ Phone #: _____

Type of existing IRA or Qualified Plan to be transferred or rolled over: (please choose one)

Traditional SEP IRA 401K 403(b) Pension Gov. 457 Plan Simple Other _____

ASSET LIQUIDATION INSTRUCTIONS

Asset Description	Quantity in IRA	Quantity To Be Transferred	Liquidate Immediately	Liquidate at Maturity	Transfer In-Kind
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SELECT ONE: Close my current account after transfer **OR** Partial transfer

SELECT ONE: Wire my funds to GoldStar Trust Company. I acknowledge that a wire fee may be charged by my current custodian.
 Send a check payable to GoldStar Trust Company (for the benefit of my IRA).

RMD - REQUIRED MINIMUM DISTRIBUTION RESTRICTION (AGE 70 ½ OR OLDER ONLY)

I authorize the trustee or custodian named above to: distribute my RMD to me prior to transferring my Traditional or SEP IRA assets,
 segregate and retain my RMD amount or include the amount that represents my RMD in the transfer. *Effective 1-1-2010*

THIS BOX FOR INTERNAL USE ONLY

GoldStar Trust Company agrees to serve as the new Custodian for the account of the above-named individual, and as Custodian, we agree to accept the assets being transferred.

GoldStar Account Identification # _____

GoldStar Trust Company
Tax ID# 74-2557688

Authorized Signature for GoldStar *Date*

SIGNATURE GUARANTEE: Check with your current custodian to determine if a Medallion Stamp Guarantee is required. This is NOT a requirement of GoldStar Trust Company.

CUSTOMER SIGNATURE

Transfers Only:

I authorize the transfer of the IRA assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by GoldStar Trust Company.

Direct Rollovers Only:

I understand the rules and conditions applicable to direct rollovers and certify that I qualify for a direct rollover of the funds or assets listed above. Due to the important tax consequences of rolling funds over to an IRA or other qualified plan, I have been advised to see a tax advisor. I hereby request payment from the plan designated above in the form of a direct rollover. I assume full responsibility for this direct rollover transaction and will not hold GoldStar Trust Company or the Plan Administrator of either the distributing or receiving plans liable for any adverse consequences that may result. I hereby irrevocably designate this contribution of the funds and/or property indicated above as a direct rollover contribution.

X _____
Account Holder's Signature *Date*