

Precious Metals Investment/Transfer Authorization

IMPORTANT INFORMATION

Sending incomplete documents will delay the funding/transfer process. Please make sure the Columbia Private Trust Account ("Account") contains sufficient cash to cover the investment, minimum cash requirement and all applicable transaction fees. **Please note:** Depository Trust Company of Delaware, LLC provides precious metals safekeeping and shipping services as an independent contractor of Columbia Private Trust. Depository Trust Company of Delaware, LLC is not affiliated with Columbia Private Trust.

PURCHASING/LIQUIDATING PRECIOUS METALS:

Columbia Private Trust is not a precious metals dealer. If you are interested in investing in precious metals within your IRA, you must use a precious metals dealer approved by Columbia Private Trust. If your metals dealer is not approved, your request may be delayed or rejected. For additional information regarding approved dealers, please contact our Client Service Team at 800.962.4238. Once you have identified the dealer you would like to work with and you have negotiated a purchase with the dealer (metal type, weight, etc.), please submit this form to Columbia Private Trust so we can forward the appropriate funds to complete the transaction. Please accompany this Columbia Private Trust form with the selected metals dealer invoice for the purchase. At the time funds are transferred, Columbia Private Trust will also forward shipping instructions to the dealer so the metals will be shipped and deposited into your newly established Depository Trust Company of Delaware account. Please be sure the amount listed on this form is inclusive of any dealer commission, shipping, handling and insurance costs. Columbia Private Trust will pass through any costs associated with precious metals storage to your Account.

The following are the maximum threshold markups over the Spot Price at the time of Pre-Trade Authorization:

- Gold115%
- Silver140%
- Gold less than ¼ oz120%
- All other coins115%

Investment requests into Precious Metals exceeding these threshold limits will be rejected.

* Indicates required information

1. ACCOUNT OWNER INFORMATION

NAME (FIRST, MI, LAST)*	COLUMBIA PRIVATE TRUST ACCOUNT NO.*
CELL PHONE NO.*	HOME PHONE NO.
EMAIL ADDRESS*	

2. INVESTMENT INSTRUCTIONS (PLEASE PROVIDE A COPY OF YOUR DEALER INVOICE)

I authorize Columbia Private Trust to make (please select one):

- ☐ New Purchase
 ☐ Additional Purchase
 ☐ Transfer/Rollover
 ☐ Sell/Liquidate

Precious Metal Type	Description of Coins, Bars or Rounds	Quantity	Value

Total amount of purchase (including dealer commission, shipping, handling and insurance): \$ _____

SUB-ACCOUNT SETUP:

- ☐ I would like my metals segregated from other investors' precious metals and I agree to the fees listed on page 4 of this Precious Metals Investment/Transfer Authorization.



3. DEALER INFORMATION

COMPANY NAME*		CONTACT NAME*	
FAX NO.*		CONTACT PHONE NO.*	
DEALER'S ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTRY*	POSTAL CODE*
DEALER'S EMAIL ADDRESS*			

4. FUNDING INSTRUCTIONS

All precious metals transactions will be funded via wire transfer and Columbia Private Trust wire fees apply. Please see your Columbia Private Trust fee schedule for wire fee amount.

PAYEE NAME*			
MAILING ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTRY*	POSTAL CODE*

Please provide wire instructions below. Submitting incomplete information or attaching instructions separately will delay funding, as additional verification will be needed.

BANK NAME*	ABA NO.*
BANK ACCOUNT NAME*	BANK ACCOUNT NO.*
REFERENCE*	

5. SIGNATURE

By signing below I have reviewed, understand, and agree to the disclosures listed below

	ACCOUNT OWNER SIGNATURE*	DATE*
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NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.



6. ACKNOWLEDGMENT & DISCLOSURES

1. I understand, acknowledge and agree that I am responsible, and Columbia Private Trust and its related entities are not responsible, for selecting and reviewing the above investment and for determining the suitability, nature, value, risk, safety and merits of the investment that I authorize and direct Columbia Private Trust to make for my Columbia Private Trust Account ("Account").
2. I verify that I have received and read all pertinent information relating to the investment(s) named herein (i.e. private placement memorandum, purchase agreement, subscription documents, etc.). I verify that (i) I am capable of evaluating the investment characteristics and risks of the investment independently, or have relied on an investment professional with knowledge and experience related to investments of the type described above; and (ii) I am not relying on the Custodian for any advice or recommendation in evaluating the investment. I also verify that I agree to be bound by the terms of the Custodial Account Agreement, which I agreed to together with Columbia Bank, through its division, Columbia Private Trust, as the Custodian of record. I acknowledge that the terms of the Custodial Agreement are incorporated herein by reference, except that where the terms of this Precious Metals Investment Authorization conflict with the terms of the Custodial Agreement, the terms of this Precious Metals Investment Authorization shall control.
3. I understand that Columbia Private Trust is not related to or affiliated with the management or selling agent (Precious Metals Dealer) of the investment(s) that I have directed Columbia Private Trust to purchase for my Account. I acknowledge that Columbia Private Trust has not reviewed, recommended or commented on the investment merits, risks, suitability or management of the asset(s) I have selected and I authorize Columbia Private Trust to process this transaction. I also understand and agree that Columbia Private Trust and its related entities will not be responsible to take any action, or have any other obligation or liability, should the investment noted herein become subject to default, including fraud, insolvency, bankruptcy, or other court order or legal process.
4. I understand that Columbia Private Trust will request confirmation of purchase as part of its role as custodian of my Account. I also understand and agree that if the asset sponsor of the investment does not provide documentation necessary to confirm this investment, Columbia Private Trust may resign as custodian of the asset(s), which may be a tax reportable event.
5. Prohibited Transactions. I represent that the above investment is not a prohibited transaction, as defined in the Internal Revenue Code Section 4975. If I, a family member or another disqualified person am/is an officer of, or has an ownership interest in the entity in which I am investing, I represent that I have consulted my tax advisor prior to submitting my investment instructions.
6. I acknowledge that this investment is not insured by the FDIC, is not an obligation of or guaranteed by Columbia Private Trust and is subject to risk, including the possible loss of principal.
7. I acknowledge that I have received, understand, and agree to Columbia Private Trust's Valuation Reporting Policy as outlined in the Custodial Agreement. I understand that Columbia Private Trust must receive annual valuations from the investment sponsor or the investment may be distributed to me at the last reported value.
8. I agree that any costs associated with the storage of my precious metals at the Depository Trust Company of Delaware, LLC will be passed through to my Columbia Private Trust Account.
9. I understand, acknowledge and agree that any dispute regarding this investment shall be handled pursuant to the terms of the Custodial Agreement. I understand that the prevailing party shall be entitled to recover all legal fees, reasonable costs and expenses and that these shall be in addition to any award of damage or any other relief to which the prevailing party is entitled.
10. I agree to release, indemnify, defend, and hold Columbia Private Trust and its related entities harmless from any claims arising out of processing this investment authorization including any damages, fees (including legal fees), costs or expenses arising therefrom.

PERMISSIBLE PRECIOUS METALS:

(Subject to Change)

Gold

- American Eagle bullion and/or proof coins¹
- American Buffalo bullion coins
- Australian Kangaroo/Nugget bullion coins
- Austrian Philharmonic bullion coins
- British Britannia bullion coins (.999+ fineness)
- Canadian Maple Leaf bullion coins
- Mexican Libertad bullion coins (.999+ fineness)
- Credit Suisse — Pamp Suisse Bars (.999+ fineness)
- U.S. Buffalo Gold Uncirculated coins (no Proofs)
- Bars and rounds as referenced below²

Platinum

- American Eagle bullion and/or proof coins¹
- Australian Koala bullion coins
- Canadian Maple Leaf bullion coins
- Isle of Man Noble coins
- Bars and rounds as referenced below²

Silver

- American Eagle bullion and/or proof coins¹
- American America the Beautiful bullion coins
- Australian Kookaburra and Koala bullion coins
- Austrian Philharmonic bullion coins
- British Britannia bullion coins
- Canadian Maple Leaf bullion coins
- Mexican Libertad bullion coins
- Bars and rounds as referenced below²

Palladium

- Canadian Maple Leaf bullion coins
- Bars and rounds as referenced below²

¹ Coins, including the American Eagle, that have undergone "certification" (also known as "stabbed" coins) are not acceptable in IRAs at this time.

² Bars and rounds produced by manufacturers accredited by Nymex/Comex, LME, LBMA, NYSE/Liffe/CBOT, and ISO-9000 or a national mint. The minimum fineness for bars are:

Gold: .995+

Silver: .999+

Platinum: .9995+

Palladium: .9995+

Upload forms to:

ColumbiaPrivateTrust.com/Upload

Fax to: 303.614.7098

Send mail to:

Columbia Private Trust
Processing Center
PO Box 981012
Boston, MA 02298 -1012

For express deliveries:

FIS – Remittance Processing
Loading Dock #2
Attn: Columbia Private Trust
10 Dan Road
Canton, MA 02021

Questions?

Call 800.962.4238



Depository Trust Company of Delaware, LLC

Precious Metals Safekeeping and Shipping Fee Schedule

Individual Retirement Accounts

Commingled Allocated Holdings

(Sub-Accounted by Customer)

*Default Sub-Account Setup

Gold/Platinum/Palladium/Silver

\$0.80 per \$1,000 (8 basis points)

\$95.00 minimum

Billed the quarter following account opening, and every anniversary thereafter.

Segregated Allocated Holdings

(Sub-Accounted by Customer)

(Stored separately from other Investor's precious metals)

If you would like your sub-Account segregated please select "segregated" in section 2

\$1.60 per \$1,000 (16 basis points)

\$190.00 minimum

Billed the quarter following account opening, and every anniversary thereafter.

**Internal transfer from segregated Accounts incur a \$25.00 transfer fee per transaction.

NOTE: The above fees are billed in advance at the time an Account is opened and on the sub-Account opening date thereafter each subsequent year. Storage fees are neither prorated nor refundable. Subject to change.

HANDLING FEES

Preparation of Outgoing Shipments via Armored or Private Carrier

\$0.10 per ounce for all bullion other than the items listed below. (Please note that if bags or boxes are unsealed and detailed verification and handling is required to prepare their contents for release, the standard \$0.10 per ounce charge will apply.)

\$10.00 per item for:

- 1,000 ounce silver bars
- 100 ounce gold bars
- 400 ounce gold bars
- 50 ounce platinum plates
- 100 ounce palladium plates
- Sealed 90% silver bags
- Sealed 40% clad bags
- Mint sealed bullion coin boxes

A \$25.00 minimum charge per out-shipment will apply in every instance, and this fee is due on the date on which Columbia Private Trust gives Depository Trust Company of Delaware, LLC instructions to prepare a shipment for delivery even if the delivery instructions are later canceled. Shipments will be prepared in accordance with Depository Trust Company of Delaware's industry standard practices for packaging shipments.

Preparation of Outgoing Shipments via US Postal Service or Express Mail Carrier

The Depository Trust Company of Delaware, LLC will charge **\$19.50 per package** handling fee, plus all applicable postage, registration, and insurance charges.

NOTE: Express mail carriers include Federal Express, United Parcel Service and others. Express mail carriers are subject to change without notice.

Columbia Private Trust will pass the above fees through to your Columbia Private Trust Account. These fees are in addition to any Columbia Private Trust asset fees listed on your fee schedule.

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