QUESTIONS? 888 322 6534 SUBMIT FORM: forms@iraresources.com

858 459 6565 fax

Interested Party Designation (IPD)

1. ACCOUNT OWNER INFORMATION

Full Name (as it appears on your account application)		cial Security Number
Account Number	Account Type	
	☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE ☐ HSA	⊐ ESA
Account Number	Account Type	
	☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE ☐ HSA	⊐ ESA
Account Number	Account Type	
	☐ Traditional ☐ Roth ☐ SEP ☐ SIMPLE ☐ HSA	⊐ ESA
2. INTERESTED PARTY DESIGNATION		
Please complete the information below to authorize your spouse, financial advisor (broker, financial planner, accountant, attorney, or other person, etc.) to receive information about your account. Please note that this individual will have unlimited access to your account information, but they will not be able to make changes to your account. This form must be completed in full. Choose One of The Following:		
☐ Change Existing IPD to Name Below	□ Add New or Additional IPD □ Revoke	IPD (name):
Name of IPD	Company Name	Date of Birth
Street Address	City	State Zip
Email Address	Daytime Phone Number Evening Phone Number	r Fax Number
3. ACCOUNT OWNER SIGNATURE AND ACKNOWLEDGEMENT		
Your signature is required. Please ensure th	at you read and acknowledge the following disclosur	e before you sign and date this form.
I understand this Designation will remain in effect until IRAR Trust Company has received a written notice of revocation from me. I authorize IRAR Trust Company to release and make information available regarding my account to the person listed above, including but not limited to: statements, or other written, verbal, or electronic communications. I understand that IRAR Trust Company will not accept transaction instructions or account changes from this individual.		
I acknowledge that my account is self-directed, and I am solely responsible for the selection, and management of all investments held within my account. IRAR Trust Company will not and has not provided me any investment advice or investment recommendations. Any Interested Party Designated is in no way affiliated with IRAR Trust Company. I understand that even if a third party or firm suggested or recommended that I establish and account with IRAR Trust Company, such third party is not in any way an agent, employee, representative or affiliate of IRAR Trust Company.		
I agree to indemnify and hold harmless IRAR Trust Company, against all claims, actions, costs, and liabilities, including attorneys' fees, arising out of their reliance on this Designation. This indemnity and hold harmless provision shall survive any Termination of this Designation.		
ACCOUNT OWNER SIGNATURE		DATE
→		

IRAR PROCESSING CENTER 1000 BROADWAY, SUITE 350 OAKLAND, CA 94607 PHONE: 888-322-6534