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Interested Party Designation Form

Traditional | Roth | SEP | SIMPLE

PTC IRA Account Number

SECTION 1 | IRA Account Owner Information

First Name Last Name Last 4 Digits of SSN DOB (MM/DD/YY)

Daytime Phone Number Email Address

SECTION 2 | Interested Party Designation

Complete the information below only if you wish to authorize an individual to receive information on your account.

I hereby designate the below-mentioned Interested Party Designee subject to all applicable terms and provisions stated in the Custodial Agreement. I authorize this Interested Party Designee to receive statements and other account information from Preferred Trust Company as Custodian via written, telephonic or electronic communications. I agree that Preferred Trust Company as Custodian is under no duty to investigate or inquire about the Interested Party Designee. I understand that this individual is not authorized to execute transactions on my behalf. I understand that I may revise this information at any time by giving written notice to Preferred Trust Company. If an IRA Account Owner would like to grant an Interested Party Agent authorization to execute transactions on their behalf, Preferred Trust Company as Custodian requires a Limited Power of Attorney on file.

Individual/Financial Representative Name *(if applicable)*

Company/Broker Dealer Affiliation *(if applicable)*

Mailing Address

City State Zip Code

Phone Number Email

SECTION 3 | Acknowledgement Signatures

Signature of IRA Account Owner Date

INTERNAL USE ONLY

Verified
(Initials and Date)