



**Client Services** | 888.990.7892  
 E. info@ptcemail.com  
 F. 702.946.0136  
 W. www.preferredtrustcompany.com  
 6700 Via Austi Parkway, Suite 301  
 Las Vegas, NV 89119

# Fluctuating Recurring Property Taxes Expense Authorization Form

Completed by IRA Account Owner

PTC IRA Account Number

**The Fluctuating Recurring Property Taxes Expense Authorization Form will be processed as directed by the IRA Account Owner unless otherwise notified in writing of a change.**

## 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 | Investment Information

Preferred Trust Company requires a **photocopy of an invoice/authorization** for services/goods related to the asset to be attached to this form to be processed.

Property Address or Name of Investment Asset   
 Relevant % of Ownership  % **Maximum** Total Amount to be Paid  When the amount listed exceeds the allowable amount approved, a Preferred Trust Company representative will contact you for approval.

## SECTION 3 | Payment Direction Information

### Recurring Payment Frequency

I acknowledge that taxes on the property must be paid on a recurring basis determined by the county in which the property is located. Upon Preferred Trust Company receiving an invoice from the county, the payment will be processed from my IRA up to the maximum amount authorized, unless the property is sold or I otherwise notify Preferred Trust Company in writing of a change.

IRA Account Owner Initials

Check Payee Name

### Mailing Instructions

All checks will be sent to the address on the invoice provided unless, the **Special Delivery Instructions** below instructs Preferred Trust Company differently.

Special Delivery Instructions

## SECTION 4 | Signature

By signing below you authorize Preferred Trust Company as Custodian to process the Property Taxes Expense Authorization Form. **The Fluctuating Recurring Property Taxes Expense Authorization Form will be processed as directed by the IRA Account Owner unless otherwise notified in writing of a change.**

Signature of IRA Account Owner  Date

### INTERNAL USE ONLY

**Verified**  
 (Initials and Date)