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Automatic Fee Payment for Annual IRA Account Administration Fee

PTC IRA Account Number

Preferred Trust Company as Custodian accepts fee payments to an IRA account. There is no fee associated with automatic fee payment transactions. Funds are deducted from a checking or savings account. The financial institution must be a member of the Automated Clearing House (ACH). Deductions will be processed as designated for a one-time fee payment or recurring fee payment annually for the IRA Account Administration Fee. Preferred Trust Company as Custodian reserves the right to cancel an automatic fee payment should the ACH deduction be rejected due to insufficient funds or incorrect account information.

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 | Deduction Information

I authorize Preferred Trust Company as Custodian to deduct the below selected amount from my bank account specified on this form.

ONE-TIME FEE PAYMENT

- The amount as defined in the Deduction Amount will be deducted from the designated bank account within 2 business days of receipt of the Automatic Fee Payment form for the Annual IRA Account Administration Fee.

Deduction Amount \$

RECURRING FEE PAYMENT

- The recurring payment amount for the Annual IRA Account Administration Fee is subject to change based on the IRA Account Value each year as reflected on the right. Your acknowledgment of selecting Recurring Fee Payment grants Preferred Trust Company the authority to deduct the applicable fee each year based on the total IRA Account Value of your IRA the month prior to the anniversary date of the account establishment.

IRA Account Value	Annual IRA Account Administration Fee
\$0 - \$50,000	\$300
\$50,001 - \$100,000	\$400
\$100,001 - \$200,000	\$500
\$200,001 - \$300,000	\$600
\$300,001 - \$400,000	\$700
\$400,001 - \$500,000	\$800
\$500,001 - \$600,000	\$900
\$600,001 and up	\$1,000
PRECIOUS METALS ONLY ACCOUNTS	\$100

BANK INFORMATION

Preferred Trust Company recommends sending a copy of a **VOIDED** check for Automatic Contributions to be setup for verification purposes. Notify Preferred Trust Company if the bank information changes. An ACH that is rejected will be assessed a **\$30.00** ACH Automatic Contribution Rejection Fee.

Banking Institution Name
 Name on Account Account Type Checking Savings
 Bank Account Number Routing Number

SECTION 3 | Acknowledgement

I authorize Preferred Trust Company as Custodian to deduct the above stated amount from my bank account specified on this form. This authority will remain in effect until I submit written notice of change or termination.

Signature of IRA Account Owner Date

INTERNAL USE ONLY

Verified
(Initials and Date)