

# US COIN BULLION

## IRA CHECKLIST

COMPLETE THE FOLLOWING FORMS:

### IRA Application

COMPLETE:

PART 1. IRA OWNER

PART 3. CUSTOMER IDENTIFICATION PROGRAM INFORMATION (CIP)

PART 5. BENEFICIARY DESIGNATION

PART 6. SPOUSAL CONSENT (SIGNATURE REQUIRED)

PART 7. SIGNATURES (SIGNATURE REQUIRED)

### IRA Transfer – Direct Rollover Request

(IRA OWNER INFORMATION & SIGNATURE REQUIRED)

### Trading Authorization

(IRA OWNER INFORMATION & SIGNATURE REQUIRED)

### Precious Metals Investment Direction

(IRA OWNER INFORMATION & SIGNATURE REQUIRED)

**Please provide a copy of a recent statement from your current IRA custodian or employer retirement plan.** Must provide us with a copy of driver's license; a photocopy of an unexpired, photo-bearing, government-issued identification, such as a passport, military, veteran or similar ID

