

PRECIOUS METALS INVESTMENT DIRECTION (PURCHASE)

Account Number:

Complete this Investment Direction form if you wish to purchase precious metals in your IRA .Do not use this form to sell precious metals currently held in your IRA. Use the Precious Metals Investment Direction (Sale) form instead.

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ACCOUNT HOLDER INFORMATION

Legal Name: _____ Daytime Phone: _____

Email Address: _____ FAX Number: _____

2

DEALER INFORMATION

Name of Dealer: _____ Contact: _____

Address: _____ Phone: _____ FAX: _____

City: _____ State: _____ ZIP: _____ Email Address: _____

3

INVESTMENT DIRECTION

The Account Holder must sign the invoice and include a copy of the signed invoice with the Investment Direction form.

I hereby authorize and direct IRA Plus Southwest, LLC to purchase precious metals for my IRA from/through the dealer identified above per the attached invoice and payment instructions below. I acknowledge that I have reviewed the invoice and by signing the invoice I represent that it correctly reflects the intended purchase on behalf of my IRA.

INVOICE NUMBER: _____ I have signed the invoice and attached a copy

TOTAL AMOUNT OF PURCHASE: \$ _____
(Must match amount on invoice)

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PAYMENT INSTRUCTIONS (CHOOSE ONE):

Make check payable to Dealer and send to address above

Make check payable to payee below and send to address below

Name: _____

Address: _____

Wire funds to Dealer/Payee (Additional fee applies, per fee agreement)

Wiring instructions:

Bank Name: _____

ABA/Routing Number: _____

Account Name: _____

Account Number: _____

Account Address: _____

5 ACCOUNT HOLDER ACKNOWLEDGEMENTS, REPRESENTATIONS AND SIGNATURE:

I, the above named account holder, hereby agree, acknowledge and represent the following:

A. I acknowledge and agree to all of the provisions, and specifically the investment provisions, of the Form 5305 (Custodial Agreement) that is hereby incorporated by reference into this section of the Investment Direction form. I agree and acknowledge that neither IRA Plus Southwest, LLC ("IPS") nor the Custodian is a fiduciary with regard to my IRA.

B. I further agree and acknowledge that I have the sole responsibility for the investment of my IRA assets with IRA Plus Southwest, LLC and that IRA Plus Southwest, LLC and the Custodian named in the Form 5305 (Custodial Agreement) shall have NO LIABILITY for any losses, expenses, damages (of any kind), costs, including court costs and attorney fees, or taxes, including tax resulting from prohibited transactions or disqualification of my IRA resulting from transactions executed by IRA Plus Southwest, LLC and/or Custodian and authorized by me, my power of attorney or other authorized representative.

C. I agree and acknowledge that IRA Plus Southwest, LLC and the Custodian have not provided and do not provide any investment management or advice, legal and/or tax advice and will not be responsible for any investment results (gain or loss) of this or any asset in my IRA.

D. I agree and represent that I have performed or will perform the necessary and required due diligence of a prudent investor with regard to the investment and investment sponsor or dealer, including but not limited to, obtaining and reading any applicable prospectus, private placement memorandum, offering circular or similar document prior to authorizing IRA Plus Southwest, LLC and/or Custodian to make this investment on behalf of my IRA.

E. I agree and acknowledge that IRA Plus Southwest, LLC and/or Custodian do not review or evaluate any investment or any sponsor of any investment.

F. I agree to defend and indemnify IRA Plus Southwest, LLC and the Custodian and to hold them harmless from and against **all losses, expenses, damages (of any kind), costs, including court costs and attorney fees, or taxes, including tax resulting from prohibited transactions or disqualification of my IRA** resulting from transactions executed by IRA Plus Southwest, LLC and/or Custodian and authorized by me, my power of attorney or other authorized representative either orally or in writing, or otherwise in connection with this or any investment which I hold in my account.

G. I acknowledge and represent that I have reviewed and understand Internal Revenue Section 4975 "Tax on Prohibited Transactions" including the definition of a "disqualified person" either personally or by obtaining competent legal advice. In addition, I further acknowledge and represent that the purchase or sale of the above named investments will not create a prohibited transaction under Internal Revenue Section 4975.

H. I agree and acknowledge that I am responsible for providing IRA Plus Southwest, LLC the end of the year (12/31) fair market value for each of my investments as stated in Form 5305 (Custodial Agreement).

I. I represent, agree and acknowledge that I understand the requirements of Internal Revenue Code Section 401(a)(9) Required Minimum Distributions with respect to my IRA account including the severe penalties (50% excise tax) for not making timely Required Minimum Distributions. I further agree and acknowledge that I am responsible for determining the amount and requesting distribution of any Required Minimum Distributions.

J. I agree and acknowledge that I am responsible for any Unrelated Business Taxable Income that may be generated by my IRA investments and that I am responsible for the proper filing of Form 990-T and payment of any required tax.

K. I represent, agree and acknowledge that I understand that Internal Revenue Code Section 408(m) provides that investment in any metal by an IRA is treated as a distribution except as provided in Internal Revenue Code Section 408(m)(3) and that it is my responsibility to determine whether this investment qualifies for the exception of under 408(m)(3).

L. I represent, agree and acknowledge that I understand that all precious metals held in my IRA will be stored by IPS in its vault location at the Delaware Depository Service Division of Depository Trust Company of Delaware, LLC ("Depository").

M. I represent, agree and acknowledge that I understand that NEITHER IPS NOR THE CUSTODIAN NOR THE DEPOSITORY SHALL ASCERTAIN NOR BE RESPONSIBLE OR LIABLE FOR THE AUTHENTICITY OR CORRECTNESS OF THE MARKING, OR THE WEIGHT, CONTENTS, FINE-NESS OR VALUE OF METALS, INCLUDING, BUT NOT LIMITED TO, METALS HELD OR PURPORTED TO BE HELD IN ANY CONTAINER SAID TO CONTAIN SUCH METALS, CURRENCY OR ANY PROPERTY SHIPPED TO THE DEPOSITORY, IPS OR THE CUSTODIAN PURSUANT TO MY EXECUTION OF THIS INVESTMENT DIRECTION.

N. I represent, agree and acknowledge that I understand that payment will be made to the dealer after I provide complete instructions to IPS via this investment direction form and after sufficient liquid funds are available in my Account. I agree that neither IPS, nor the Custodian, nor the Depository shall have any liability or responsibility for any delay in delivery to the Depository or if the metals received by the Depository do not agree with those described in the invoice.

O. I agree to defend and indemnify IPS, The Custodian and the Depository and to hold them harmless from and against **all losses, expenses, damages (of any kind), costs, including court costs and attorney fees, or taxes, including tax resulting from prohibited transactions or disqualification of my IRA** resulting from any breach, conduct, action, omission or failure to act on the part of the dealer.

Printed Name: **X** _____

Signature: **X** _____ Date: **X** _____