Qualified Funds – Equity Trust Application

Go online to Equity Trust: www.Trustetc.com

Click the **OPEN AN ACCOUNT** button.

Click on the **LAUNCH APPLICATION WIZARD** button.

ACCOUNT SET UP - Page 1

Q1: Are you completing this application for another individual?

Choose: **YES**

Q2: Account Type

(From the drop-down list, select either **Traditional IRA** or **Roth IRA**)

Q3: Was this account inherited?

YES / NO (Choose the appropriate answer)

Q4: Select all asset types that are planned to be held in this account?

Check only **Precious Metals**

Q5: How would you like the depository to store the metals held in this account?

From the drop-down list, choose **Segregated**

Q6: How did you hear about Equity Trust Company?

From the drop-down list, choose **Referral** then complete the following:

Referral Name: PLP Metals LLC

Referral Email: business@plpmetals.com

Referral Phone: 866-921-3613

Click NEXT to move the next page.

ACCOUNT HOLDER - Page 2

Q1: Complete Applicants Personal Information

First Name	**Middle Name**	**Last Name**	
SS Number	**Date of Birth**	**Phone Number**	**Email Address**

Q2: Legal Address

Street Address	**Apt / Suite / Bldg**	
Zip	**City**	**State**

Q3: Mailing Address

Is the mailing address the same as the legal address?

YES / NO (If no, complete the mailing address fields)

Click NEXT to move the next page.

Verify Account Holder Information is Accurate.

If Account Holder Information is Accurate, click NEXT to move the next page.

FUNDING METHOD - Page 3

Q1: How are you funding your new account?

Choose one of the four options:

Transfer In * (Next Page will capture Custodial Information and Supporting Documents)

Rollover (Next Page will capture Estimated Amount and Supporting Documents)

Conversion (Next Page will capture Estimated Amount and Supporting Documents)

One-Time Contribution (Next Page will capture Contribution Payment Method, Contribution Amount, Contribution Year, and Supporting Docs)

Q2: Upload Documents

Upload recent Custodian or Bank account statements that show from where the funds are coming, and copies of state issued identification. Note: Name and address on ID must match the account holder's name and legal address.

CUSTODIAN INFORMATION - Page 3.1 * (If, Transfer In Option)

Q1: Custodial Account Number

Q2: Current Account Registration Name

(This usually consists of account holder name and type of account.)

Q3: Select Custodian

Choose Custodian from the drop-down list, or complete custodial information.

Q4: Type of Transfer

Choose from the options:

Q5: Original Account Type

Choose from the drop-down list the account type on the existing custodial account.

Q6: Was this account Inherited?

YES / NO

Q7: If you check "Partial Transfer" in Q4 above, select the appropriate Partial Transfer Details option.

Q8: If you checked "Cash" in Q7, enter the amount of cash.

Click **NEXT** to move the next page.

ACCOUNT RELATIONSHIPS - Page 4

Q1: Would you like to add one or more beneficiaries to this account?

YES / NO (If Yes, complete the beneficiary information.)

Q2: Would you like to add an optional authorization on this account?

Choose: **YES**

Enter the Equity Institutional Representative's Referral Number

Enter: 1799920 and click on SEARCH button. (This will return PLP Metals LLC.)

Choose: **Designated Representative** option.

Check the box: **I agree with these terms.**

Q3: Would you like to add an optional Interested Party to this account?

Choose: **NO** (You can add yourself here, but it's not necessary.)

Click **NEXT** to move the next page.

ACCOUNT PREFERENCES - Page 5

Q1: Check: Yes, I elect to receive electronic statements.

Q2: Annual Fee Payment Preference

> Choose Pay fees with my Credit/Debit Card* if the clients wants to pay setup and annual fees from funds outside of the account. Otherwise, fees will be deducted from any cash balances in the account or billed to the client in the absence of cash available.

SUMMARY - Page 6

Review the information to be sure that it's all accurate.

Q1: Account Establishment Fees

> Verify that fees are accurate. One-time Metals Fee and Set-up Fees are mandatory, other fees are optional depending upon options chosen within the application, i.e. not electing to receive electronic statements, or wire funds result in additional fees.

Q2: Upload any Supporting Documents not already uploaded.

Q3: Signature Preference

> Electronic Signature is preferred as it speeds up the process by a week or more.

Q4: Check the box: **I have read and accept the terms and conditions.**

Click **SUBMIT** button.