

## PLP Metals - Precious Metals Quote Request Process

1. Determine your client's interest in acquiring precious metals.
2. Determine funding source(s). Qualified Funds / Non-Qualified Funds

Non-Qualified Funds

Source: Document Proof of Funds

Holding: Home Safe

Bank Deposit Box (Caution – Bank Safety Ratings)

Delaware Depository

Amount: Maximum Amount of Investment Available

Metals Preference: Clients preferred metals, if known.

Qualified Funds

Source:       **Transfer In** - Custodial Information and Supporting Documents

**Rollover** - Estimated Amount and Supporting Documents

**Conversion** - Estimated Amount and Supporting Documents

**Contribution** - Contribution Payment Method, Contribution Amount,  
Contribution Year, and Supporting Docs

Amount:       Maximum Amount of Investment Available

Metals Preference: Clients preferred metals, if known.

3. Request Quote:

Complete Quote Request Form

Email Quote Request to:

Mark.Klipsch@plplanners.com

## PLP Metals Quote Form

Advisor: \_\_\_\_\_

Client Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Client:    YES \_\_\_\_\_                      NO \_\_\_\_\_

Non-Qualified Funds:       \$ \_\_\_\_\_

Ship To: \_\_\_\_\_ Home Address: \_\_\_\_\_

\_\_\_\_\_ Delaware Depository    \_\_\_\_\_ Application Submitted

Qualified Funds Available: \$ \_\_\_\_\_

Source: \_\_\_\_\_

\_\_\_\_\_ Equity Trust Application Submitted

Email Quote Requests to:

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