



## **Application Instructions**

**Individual or Joint Account**

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## INSTRUCTIONS FOR COMPLETING AN INDIVIDUAL / JOINT APPLICATION:

All information submitted must be in the English language or accompanied by a certified English translation.

### Section One: Account Owner Information

- Under '**A. Owner**' please complete all requested information including the applicant's name, date of birth, Country of Citizenship and contact information.
- If this is to be a joint account, please complete all requested information under '**B. Joint Owner**'.
- Under '**C. Preferred Contact Method**', please indicate the means by which we may contact you.

### Section Two: Bank Account of Record

- Under '**A. Your Bank's Information**' please complete all requested information including the name and address of your bank.
- Under '**B. Your Bank Account Information**' please include the names on the bank account, the ABA number and bank account number.
- Under '**C. For International Accounts**', please complete if applicable.

### Section Three: Funding Your Account

- Please indicate the method by which you will initially fund your account (bank wire or check).

### Section Four: Optional Account Access Authorization

- Please indicate whether or not you will allow information on your account to be shared by an individual not listed as an Account Owner.
- Please note, an Authorized Interested Party only receives information about your account and has no authorization to give investment instructions for your account.
- An Authorized Designated Representative does have authority to give investment instructions for your account and has unlimited access to it. However, the Designated Representative is **not** authorized to give delivery instructions on your bullion.

- If an Authorized Interested Party or an Authorized Designated Representative is assigned to your account, please complete all the required contact information for that person.

### **Section Five: Required Supplemental Documentation**

- In order to comply with 'Know Your Client' (KYC) government requirements, an acceptable form of identification must accompany your application.
- Please indicate which form of identification will be submitted and make a readable copy of it.

### **Section Six: Account Owner Declaration**

- Please read and review the Account Owner Declaration and then print or type the name of the Account Owner(s), and sign and date the form in the appropriate spaces.

### **The Bailment Agreement**

- On the first page of the Bailment Agreement, fill in the appropriate spaces for the date, the name of the Account Owner(s), and the principal address of the Account Owner(s).
- Please read and review the 14 points of the Bailment Agreement.
- Complete the Bailment Agreement on the last page by printing the name(s) of the Authorized Signatory(s) and signing and dating the Bailment Agreement.

Submit the completed Application and Bailment Agreement along with the supplemental documentation to the Strategic Gold office via email or regular mail.

Thank you! We look forward to serving you.