



Application Instructions

Trust Account

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INSTRUCTIONS FOR COMPLETING A TRUST APPLICATION:

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

Prior to Section One, please identify the type of Trust by checking the appropriate box.

Section One: Account Owner Information

- Please complete all requested information including the name of the Trust, date of establishment, EIN, address, and contact information.
- Under **'Trustee'**, please list one trustee of the trust by name, address, date of birth, Country of Citizenship and contact information.
- Under **'Trustee'**, please list a second trustee if applicable, by name, address, date of birth, Country of Citizenship and contact information.
- Under **'Preferred Contact Method'**, please indicate the means by which we may contact you.

Section Two: Bank Account of Record

- Under **'A. The Trust's Bank Information'** please complete all requested information including the name and address of the Trust's bank.
- Under **'B. The Trust's 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 the Trust will initially fund the account (bank wire or check).

Section Four: Optional Account Access Authorization

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

- If an Authorized Interested Party or an Authorized Designated Representative is assigned to the Trust's 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 this application.
- Please include the three forms of identification for a Trust described in Section Five and make readable copies of them.

Section Six: Account Owner Declaration

- Please read and review the Account Owner Declaration and then print or type the name of the Trustee(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 Trust and the principal address of the Trust.
- Please read and review the 14 points of the Bailment Agreement.
- Complete the Bailment Agreement on the last page by printing the names of the Authorized Signatories, 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.