



### Transaction Tips:

Investments must be at arms length, not involving disqualified parties referenced in IRS 4975.

Some transactions may generate Unrelated Business Income Tax (UBIT), so consult with the investment sponsor, an investment advisor, and/or tax professional. NuView IRA does not know if and when UBIT applies within this investment, and it cannot be relied upon to provide any specific UBIT information.

### Submit Documents Via:

**My NuView Online Portal**  
Accounts.NuViewIRA.com

**Email**  
Documents@NuViewIRA.com

**Fax**  
(407) 571-9541

**Mail**  
NuView IRA Processing Office  
280 S. Ronald Reagan Blvd.  
Longwood, FL 32750

**Discover a new world of investment options.**

# PRECIOUS METALS

## Purchase Instructions

*Simply follow the checklist below, and NuView will purchase this investment via your self-directed IRA. Please read and complete all documents in this packet, and return to NuView. Funding will be sent within three (3) business days upon receipt of ALL required documents, in good order.*

### ***NuView documents to be completed and submitted:***

- Precious Metals Purchase Authorization
- Precious Metals Depository Holdings Election Form

### ***Supporting documents to be completed and submitted:***

- Purchase Invoice from Metals Dealer (signed as approved)

### ***Before submitting your transaction, please ensure:***

- 1) Your self-directed IRA with NuView has been established
- 2) Your IRA has cleared funds available to make the investment
- 3) All investments have been titled in the name of your IRA:  
*NuView Trust Co. Custodian FBO [Client Name] IRA #*
- 4) All instances of "Investor's Address" are:  
*280 S. Ronald Reagan Blvd., Longwood, FL 32750*

**ALL SUPPORTING DOCUMENTS MUST BE INITIALED ON EVERY PAGE AS READ AND APPROVED OR THEY CANNOT BE PROCESSED.**





## Precious Metals Purchase Authorization

**NuView IRA Processing Office**  
 280 S. Ronald Reagan Blvd.  
 Longwood, FL 32750  
 P: (877) 259-3256 | F: (407) 571-9541  
 E: Documents@NuViewIRA.com

### 1 ACCOUNT INFORMATION

<b>Name</b> <i>(Your name as it appears in your plan)</i> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____	<b>Account Number</b>
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### 2 DEALER INFORMATION

<b>Company Name</b>	<b>Representative</b>	<b>Phone Number</b>
<b>Address</b>		<b>City, State, Zip</b>

### 3 METAL INFORMATION

Quantity <small>(Number of units, etc.)</small>	Metal Type	Asset Name Description <small>(U.S. Silver Eagle, 1 oz.)</small>	Proof Am. Eagle?	Troy OZ. each	Price <small>(Per number of units, etc.)</small>	Total Purchase Price <small>(Quantity x price)</small>
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
					<b>Shipping:</b>	
					<b>TOTAL:</b>	

An invoice matching the metals listed in this section MUST be submitted with this form.

### 4 DEPOSITORY

<b>Name</b>	<b>Phone Number</b>
<b>Address</b>	
<b>City, State, Zip</b>	

There are multiple depositories that specialize in storage and safekeeping of precious metals. I understand that NuView IRA, Inc is not and cannot be held responsible for the actions of these depositories and I hereby release and hold harmless Custodian from any damages that I may incur with respect to my choice of depository and any activities or lack of activities on the part of said depository.

### 5 FUNDING INSTRUCTIONS Please send the funds for purchase via: WIRE ACH CHECK TO BE PROVIDED

For WIRE(\$30) or ACH - Please complete the info below		For CHECK - Please complete the info below
<b>Bank Name</b>	<b>ABA Routing Number</b>	<b>Make Check Payable To</b>
<b>Account Holder Name</b>	<b>Account Number</b>	<b>Mail Check To</b>
<b>Address</b>		<b>Address</b>
<b>City, State, Zip</b>		<b>City, State, Zip</b>
<b>For Credit To</b>		<b>Send Check via:</b> <input type="checkbox"/> Regular Mail <input type="checkbox"/> Overnight Mail (\$30) <input type="checkbox"/> Certified Check (\$25)

### 6 FEES

How would you like to pay for your fees? (*Fees must be paid before transactions can be processed*).

**Account** (*account must have sufficient funds for investment and fees*)     
  **Credit Card** (*complete card info below*)

**Card Type:**   
  **VISA**   
  **MC**   
  **AMEX**   
  **DISCOVER**

**Credit Card Number:** \_\_\_\_\_      **Exp. Date:** \_\_\_\_\_

**Billing Address:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

### 7 SIGNATURE AND ACKNOWLEDGEMENT

I confirm that I am directing NuView IRA, Inc., Administrator, to complete this transaction as specified above. I understand that my account is self-directed, and I take complete responsibility for any investment I choose for my account, including the investment specified in this Purchase Authorization. I understand that neither the Administrator nor the Custodian (NuView Trust Company) sells or endorses any investment products, and that they are not affiliated in any way with any investment provider. I understand that the roles of the Administrator and the Custodian are limited, and their responsibilities do not include investment selection for my account. I acknowledge that neither the Administrator nor the Custodian has provided or assumed responsibility for any tax, legal or investment advice with respect to this investment, and I agree that they will not be liable for any loss which results from my decision to purchase the investment. I understand that neither the Administrator nor the Custodian has reviewed or will review the merits, legitimacy, appropriateness or suitability of this investment, and I certify that I have done my own due diligence investigation prior to instructing the Administrator to make this investment for my account. I understand that neither the Administrator nor the Custodian determines whether this investment is acceptable under the Employee Retirement Income Securities Act (ERISA), the Internal Revenue Code (IRC), or any applicable federal, state, or local laws, including securities laws. I understand that it is my responsibility to review any investments to ensure compliance with these requirements.

I understand that in processing this transaction the Administrator and the Custodian are only acting as my agent, and nothing will be construed as conferring fiduciary status on either the Administrator or the Custodian. I agree that the Administrator and the Custodian will not be liable for any investment losses sustained by me or my account as a result of this transaction. I agree to indemnify and hold harmless the Administrator and the Custodian from any and all claims, damages, liability, actions, costs, expenses (including reasonable attorneys' fees) and any loss to my account as a result of any action taken in connection with this investment transaction or resulting from serving as the Administrator or the Custodian for this investment, including, without limitation, claims, damages, liability, actions and losses asserted by me.

I understand that if this Purchase Authorization and any accompanying documentation are not received as required, or, if received, are unclear in the opinion of the Administrator, or if there is insufficient Undirected Cash in my account to fully comply with my instructions to purchase the investment and to pay all fees, the Administrator may not process this transaction until proper documentation and/or clarification is received, and the Administrator will have no liability for loss of income or appreciation.

I understand that my account is subject to the provisions of Internal Revenue Code (IRC) §4975, which defines certain prohibited transactions. I acknowledge that neither the Administrator nor the Custodian has made or will make any determination as to whether this investment is prohibited under §4975 or under any other federal, state or local law. I certify that making this investment will not constitute a prohibited transaction and that it complies with all applicable federal, state, and local laws, regulations and requirements.

I understand that my account is subject to the provisions of IRC §§511-514 relating to Unrelated Business Taxable Income (UBTI) of tax-exempt organizations. If this investment generates UBTI, I understand that I will be responsible for preparing or having prepared the required IRS Form 990-T tax return and any other documents that may be required. I understand that neither the Administrator nor the Custodian makes any determination of whether or not investments in my account generate UBTI.

I understand that the assets in my account are required by the IRS to be valued annually as of the end of each calendar year. I agree to provide the prior year end value of this investment by no later than January 10th of each year on a form provided by the Administrator, with substantiation attached to support the value provided.

I understand that with some types of accounts there are rules for Required Minimum Distributions (RMDs) from the account. If I am now subject to the RMD rules in my account, or if I will become subject to those rules during the term of this investment, I represent that I have verified either that the investment will provide income or distributions sufficient to cover each RMD, or that there are other assets in my account or in other accounts that are sufficiently liquid (including cash) from which I will be able to withdraw my RMDs. I understand that failure to take RMDs may result in a tax penalty of 50% of the amount I should have withdrawn.

I understand that all communication regarding this transaction must be in writing and must be signed by me or by my authorized agent on my behalf, and that no oral modification of my instructions will be valid.

I understand that no person at the office of the Administrator or the Custodian has the authority to modify any of the foregoing provisions. I certify that I have examined this Purchase Authorization and any accompanying documents or information, and to the best of my knowledge and belief, it is all true, correct and complete.

**Print Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_      **Date:** \_\_\_\_\_

## Precious Metals Depository Holdings Election Form

I acknowledge that I have elected to store my self-directed precious metals IRA investment with **FIRST STATE DEPOSITORY (First State)** (100 Todds Lane, Wilmington, DE 19802). I understand that the storage fee will be billed upon receipt of my first metals deposit at **First State** and billed annually thereafter. The fees will be included on the annual invoice from **NuView IRA, Inc.** for administrative services to the IRA. I also understand that the storage fee may be paid with undirected funds from my **NuView IRA, Inc.** IRA or can be paid from personal funds. All payments must be made to **NuView IRA, Inc.** as the administrator for my IRA.

Printed Name \_\_\_\_\_ IRA Number \_\_\_\_\_

Signature \_\_\_\_\_ Email Address \_\_\_\_\_

**First State**, offers only segregated storage for your IRA accounts (metals are NOT co-mingled with any other metals owned by others). Each **NuView IRA, Inc.** IRA account held at First State is an Individual Sub-Account of **NuView IRA, Inc.**; having its own reporting and physical storage per IRA individual. Additional details regarding the storage of metals at **First State** may be found in the Depository Custody agreement which is available upon request from **First State Depository**. The fee structure is listed below.

### Storage Fees:

Gold/Platinum/Palladium/Silver

\$1.00 per \$1,000 (10 basis points)

\$125 minimum

Accounts are billed the day First State receives your first metals deposit and annually thereafter. The day of receipt will become your annual billing date.

### Handling Fees:

**At First State, we offer many shipping options through various carriers for our clients. Those options include Personal Pick-ups, Armored Carrier, USPS, UPS, and FedEx. (UPS ground will be used for all domestic shipments unless otherwise instructed.) Below is a lists of all fees associated with Out-shipments of your metals.**

- Handling - \$15.00 per package (\$7.50 per each additional for multi box shipments)
- 100% of carrier fees (UPS Ground will be used unless otherwise instructed)
- 100% Insurance (\$0.90 per \$1000) (\$1.50 per \$1000 for FedEx)
- Personal Pick ups - \$30.00 (By appointment only and must provide picture ID prior to visit)
- Armored Carrier Pick Up - \$35.00