IRA
HSA
ESA

Investment Buy or Sell, For New or Existing Accounts

American Estate & Trust, LC

Account Holder's Name and Address
Full Name: _____
Mail Address: _____
City, State, Zip:_____

IRA-ESA-HSA Custodian
American Estate & Trust, LC 7251 W. Lake Mead Blvd., Ste 300 Las Vegas, NV 89128 Fax (702) 562-4122 Ph. (866) 654-6111 e-mail: info@trusteeamerica.com

Social Security No.	Date of Birth	Home Phone	Account Type	AET Acct. No.
			☐ IRA ☐ Educ SA ☐ Health SA	

To Buy An AE-Trust Portfolio Option Investment

I hereby direct that the following purchase(s) be made in behalf of and using funds from my above listed account:

Buy $_____ of Portfolio Option 1, Money Market Fund

Buy $_____ of Portfolio Option 2, Index Mutual Funds, "Set It & Forget It Portfolio"

Buy $_____ of Portfolio Option 3, Guaranteed Payment Contract, Equity Indexed Annuity

Buy $_____ of Portfolio Option 4, Managed Money Account

Buy $_____ of Portfolio Option 5 (Reserved For 72(t) Early Withdrawal IRA

Buy $_____ of Portfolio Option 6

Buy $_____ of Portfolio Option 7

Other Investment Buy-Sell Order(s)

NOTE: To avoid AE-Trust transaction fees, execute buy-sell trades yourself with your broker, mutual fund, etc.

I hereby direct the following "sell" order(s), liquidating in behalf of my above listed account:

1. **Sell** $_____ **Or,** _____ of _____ _____
(No. of Shares, units, etc.) (Exact Name of Stock, Fund, Bond, Etc.) Listing Symbol

2. **Sell** $_____ **Or,** _____ of _____ _____
(No. of Shares, units, etc.) (Exact Name of Stock, Fund, Bond, Etc.) Listing Symbol

I hereby direct the following "buy" order(s) in behalf of and using funds from my above listed account:

1. **Buy** $_____ **Or,** _____ of _____ _____
(No. of Shares, units, etc.) (Exact Name of Stock, Fund, Bond, Etc.) Listing Symbol

2. **Buy** $_____ **Or,** _____ of _____ _____
(No. of Shares, units, etc.) (Exact Name of Stock, Fund, Bond, Etc.) Listing Symbol

Special Instructions	Signature
	I understand that all investment decisions are mine, and mine alone. I understand that my account with American Estate & Trust, LC (AET) is self-directed and that AET does not and has not recommended any specific investment or decision to me. I understand that the Portfolio Option investments listed by AET are presented for informational purposes only, not as a recommendation or an endorsement. I understand that all investment decisions are subject to all applicable Federal and state laws, and to the regulations and policies of AET, including laws, regulations and policies presently existing or which may exist in the future. I certify that all of the information provided by me is correct and may be relied upon by American Estate & Trust, LC. _____ _____ (Account Holder) (Date)