

NOTE: In order for funding to take place, your verbal confirmation call is required. Please call our office during hours of operation at (845) 947-1000 to verbally confirm these instructions with a specialist. **Please know that this step is required.**

IMPORTANT! Assets must be titled as follows: "Madison Trust Company Custodian FBO [Accountholder's name] [MTC Account #]"

Please complete and submit this form via one of the following methods:

Mail: Madison Administration Company, 21 Robert Pitt Drive, Suite 201, Monsey, NY 10952 **Fax:** (845) 947-1212 **Secure Upload:** www.madisontrust.com/uploads

A. ACCOUNTHOLDER INFORMATION

Full name

MTC Account number

B. INVESTMENT INSTRUCTIONS

Asset to be purchased or invested in

Asset name

Asset type (e.g., real estate, promissory note, private placement, precious metals, LLC, etc.)

Asset contact information

Name of sponsor/managing entity

Address

Contact person (if applicable)

Phone number

Email address

Dollar amount to invest

Invest exactly \$ _____

To ensure the timely processing of your investment, please make certain that there are sufficient funds to cover any fees due as well as the \$500 minimum balance.

Invest all available cash balance (less the required \$500 minimum balance, fees due, and transaction fees)

To ensure the timely processing of your investment, please make certain that there are sufficient funds to cover any fees due as well as the \$500 minimum balance.

Quantity (either percentage or shares) of asset to purchase (if applicable)

100% of asset

Specific amount: _____

C. DOCUMENT REQUIREMENTS

Several documents may be required to complete your investment transaction. Please refer to the appropriate flow chart on our website under the Forms/Fees tab.

D. EXPEDITED SERVICE

Madison Trust processes every form in an efficient and quality manner. However, if you have special time constraints and require expedited processing time (1-2 days instead of standard 3-4 day handling time), select this service:

Expedited Service: Madison Trust will expedite the funding of your investment (\$50 Expedited fee applies)

** Please note that any forms submitted after 1 PM EST will be considered received on the following business day (applies to both standard and expedited processing). **

E. HOW/WHERE SHOULD MADISON TRUST SEND THE FUNDS? (PLEASE CHOOSE ONE.)

Option 1: Send check via regular delivery (default)

Option 2: Send check via overnight delivery (\$50 Overnight Fee applies)

(Please note: If shipping to a P.O. Box overnight delivery is not available.)

Make check payable to (if applicable): _____

Name Address

City State ZIP

Option 3: Send a Wire (\$25 Wire Fee applies) *Please attach a copy of a canceled/voided check to the form for verification purposes.*

Bank name Routing transit number (ABA) Bank address

Bank phone number Beneficiary account number Beneficiary account name

For further credit (if applicable)

F. ACKNOWLEDGEMENT, AUTHORIZATION, & SIGNATURE

I hereby acknowledge that I am solely responsible for the investment instructions I am making. I agree to indemnify, hold harmless, and release Madison Trust and Madison Administration Company from any and all liabilities that either or both may incur directly or indirectly from my investment. I further acknowledge that I am solely responsible for the success or failure of this investment. I hereby authorize the purchase of the asset listed above for my Madison Trust Custodial Account.

Accountholder signature Date

For MTC use only:

Confirmed by Date & time DOB & SS confirmed PT Check Sufficiently cleared funds