

INTERESTED PARTY DESIGNATION FORM

 **New Direction**
TRUST COMPANY
1070 W. Century Drive
Louisville, CO 80027
P: 877-742-1270 | F: 303-665-5962

1. NDTCO ACCOUNT INFORMATION

Account Holder Name:

Account Holder Account Number:

2. INTERESTED PARTY INFORMATION

Interested Party Name:

Interested Party Phone:

Interested Party Email:

Interested Party Fax:

INTERESTED PARTY VERIFICATION

Please choose a verbal password for your Interested Party Designee (IPD). NDTCO will verify IPDs by confirming the verbal password. You will be responsible for notifying your IPD of the verbal password.

Password:

ACCESS AND RESTRICTIONS

Eligibility

All interested party designees must be individuals; any attempt to designate a single entity as an interested party will not be honored by NDTCO. For the purpose of this designation, individuals shall include, but are not limited to: a spouse, financial advisor or planner, fund manager, accountant, attorney, individual employee at an entity, or any other individual determined by the Account Holder to be appropriate.

Restrictions and what information may be shared with Interested Party Designees

The designee will be entitled to receive and request general account information about your custodial account, including, but not limited to; account balances including availability of undirected cash, custodial asset information, account billing information, notices related to the custodial account, and transaction progress reports. The designee is not entitled to or in any other way allowed access to non-public personal information including, credit card information, social security number or date of birth; nor does it allow the designee to make any material changes to the account, including but not limited to; directing NDTCO to purchase, sell, or any other way encumber or pledge the custodial assets as a surety, complete paperwork, change the beneficiaries of the account, initiate transfers, rollovers, distributions, or close the account.

Interested parties can be added by the account holder at the account holder's discretion only, any attempt by the designee to designate additional individuals as interested parties on the custodial account will be immediately rejected by NDTCO. This designation will remain in effect until NDTCO has received written notification of revocation from the Account Holder, and will terminate automatically upon the Account Holder's death.

NDTCO, as a non-fiduciary custodian, does not make any determination as to the qualification of the designee. Acceptance of the designee by NDTCO should not be construed by either the account holder or the designee as an explicit or implicit endorsement of the qualifications of the designee. The account holder agrees to indemnify and hold harmless the Custodian, against all claims, actions, costs and liabilities, including attorneys' fees, arising out of their reliance on this designation. This indemnity and hold harmless provision shall survive any termination of this designation.

3. SIGNATURE

Account Holder Signature:

Date: