

ORIGINAL DOCUMENT RELEASE

TO REQUEST DOCUMENTS FROM NDTCO'S SECURE VAULT

 **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:

New Direction Account Number:

2. ORIGINAL DOCUMENTS TO BE RELEASED

DOCUMENTS TO RELEASE

REASON FOR RELEASE

1.

2.

3.

4.

5.

6.

7.

8.

3. DELIVERY INSTRUCTIONS

Send Documents Via

☐ Standard Mail

☐ Overnight Mail

☐ Pick Up

☐ Other
(Special Instructions)

Recipient Information

Recipient Name:

Recipient Phone: (Required for Overnight Mail)

Address:

Address Line 2:

City:

State:

ZIP:

Name of Authorized Individual: (Pick Up Only)

Pick Up Date: (Pick Up Only)

Special Instructions:

4. FEE PAYMENT OPTIONS

PAY TRANSACTION FEES VIA:



My Account



Credit Card on File



A New Credit Card*

*Please log into the NDTCO User Portal and go to your Profile, then Payment Method, to update your card on file.

5. SIGNATURE AND AUTHORIZATION

As the account holder, I authorize the release of the IRA's original documents. I understand and acknowledge the responsibility of these forms.

Account Holder Signature:

Date: