

IRA Investment Authorization Form

Account Holder: _____ TMI IRA Account # _____
Phone number: _____ Social Security # _____

Important! Read before completing this form:

Use this form for investments not traded through your Designated Representative. Please do not use this form to authorize investments in notes secured by mortgages, deeds of trust, viaticals and/or similar investments. Special forms/procedures for these investments are available upon request from any Customer Service Representative. **Important disclosures concerning the investments authorized on this form appear on the reverse side.**

Investment Instructions: Many securities have similar names. Please list the full investment description; do not abbreviate. Use additional photocopies of this form, if necessary. By signing this form, you agree to the terms herein which apply to your investment(s) and hereby authorize Trust Management, Inc. (TMI) to process the following transaction(s):

Purchases

| Investment Name | (For Stocks Only) Symbol | (For Mutual Funds Only) Class A,B,C,D, etc, | Shares | or | Amount |
|-----------------|-----------------------------|--|--------|----|--------|
| _____ | _____ | _____ | _____ | \$ | _____ |
| _____ | _____ | _____ | _____ | \$ | _____ |

Liquidations If proceeds are to be sent to the Account Owner, an IRA Distribution Request Form is required before funds may be distributed from the TMI account.

| Investment Name | (For Stocks Only) Symbol | (For Mutual Funds Only) Class A,B,C,D, etc, | Shares | or | Amount |
|-----------------|-----------------------------|--|--------|----|--------|
| _____ | _____ | _____ | _____ | \$ | _____ |
| _____ | _____ | _____ | _____ | \$ | _____ |

Exchanges You MUST indicate dollars or shares, but not both.

| Investment Name | (For Mutual Funds Only) Class A,B,C,D, etc, | Shares | or | Amount |
|-----------------|--|--------|----|--------|
| From _____ | _____ | _____ | \$ | _____ |
| To _____ | _____ | _____ | \$ | _____ |

Acknowledgment and signature

I verify that I have received and read all pertinent information relating to the above investment(s) (i.e., prospectus, offering circular, investment agreement, etc.), and that I meet the suitability requirements of the offering(s) indicated. I understand that Trust Management, Inc.'s valuation reporting policy (as defined on the account statement), and fee policies associated with my request. I attest that the investment does not constitute a prohibited transaction as defined in Internal Revenue Code Section 4975 and outlined in the plan documents. I agree to the indemnification and arbitration statements on the back of this page. I hereby agree to indemnify and hold harmless Trust Management, Inc. for any and all costs, obligations, losses, claims, damages and expenses (including reasonable attorney's fees) resulting from the above authorization.

Signature of Account Holder

Date

Return Form to: Trust Management, Inc., 777 Main Street Suite 3630 Fort Worth, TX 76102

Special Instructions

Please indicate any special trading instructions such as overnight or wire service for and additional fee. All purchases will be sent via first class mail unless you provide other, written instructions. Please contact TMI if you want express delivery; additional fees may apply. If funds are to be wired, attach written wire instructions. An additional fee may apply. Also, designate for which transaction (if not all) the special instructions apply

Types of Investments:

Limited Partnerships, REITs and Private Offerings

Before purchasing one of these offerings, a prospectus must be on file with Trust Management, Inc. (TMI). When reviewing an offering for operational capability, **TMI does not recommend, comment or pass on the investment merits, risk, suitability or management of the offering.** It is the Account Holder's responsibility to authorize and manage all investments in the "self-directed" retirement account. The Account Holder or Designated Representative should furnish TMI with a subscription agreement and/or other applicable execution documents. The broker/dealer information and reinvestment instructions (if applicable) should be completed prior to TMI's receipt. **NOTE:** To purchase these assets, the Account Holder must sign this Investment Authorization Form and provide a copy of the asset's subscription agreement. The Account Holder should understand that investments in limited partnerships and similar assets may generate "Unrelated Business Taxable Income"(UBTI), the tax on which must be paid from retirement plan funds. Contact your Designated Representative or asset sponsor to determine whether the investment may generate UBTI. It is the Account Holder's responsibility to notify TMI if the tax filing is necessary, and based on the information the Account Holder provides, TMI will complete a corresponding Form 990-T, for a fee. (The Account Holder may also return a completed Form 990-T to TMI for signature, incurring no additional fee.)

Certificates of Deposit

Please provide the financial institution's address and phone number under Special Instructions. TMI will follow the Account Holder's written instructions to purchase a C.D., assuming the administrative requirements of the request can be met. In order to reflect accrued interest on the Account Holder's account statement, TMI must receive reports or statements reflecting such activity on at least a quarterly basis from the designated financial institution. **NOTE:** At least 10 business days before maturity, the Account Holder should provide TMI with written notification as to how to proceed so that we may instruct the financial institution whether to liquidate or renew the C.D. If TMI does not receive such instructions, it will take no further action, and the C.D. will be handled according to the policy of the designated financial institution.

Mutual Funds

Trust Management, Inc. Should receive notification of the Account Holder's intent to purchase, liquidate or exchange holdings, along with the applicable fund application. Please understand that certain transactions and special requests may take up to two weeks, depending on the internal operations and reporting of the selected fund. **Account Holder's should specify the class of mutual fund shares to be transacted. (If no class is specified, "A" shares will generally apply.)** **NOTE:** It is the Designated Representative's responsibility to complete the broker/dealer information on the mutual fund application.

Annuities

Trust Management, Inc. "Should be recorded as both the Owner and Beneficiary of all annuities. The Account Holder is considered the "annuitant" for application purposes. **Life insurance is not permitted in IRAs by the IRS.**