



**ESTABLISHMENT DOCUMENTS**

## **Traditional/SEP/Roth IRA**

Enclosed in this Account Establishment package is:

- Account Application
- Affiliated Party Authorization
- Trust Certification Form
- Alternative Asset Transfer / Rollover Addendum
- Appointment of Attorney-in-Fact, Executor, Guardian or Conservator Form
- IRA Custodial Agreement
- Roth Custodial Agreement
- Disclosure Statement
- Custodial Addendum
- California Consumer Privacy Act (CCPA) Notice
- Privacy Policy
- Fee Schedule

**INSTRUCTIONS**

Complete the enclosed Account Application, then mail or fax it back to Pacific Premier Trust. Review and retain the Custodial Account Agreement, Disclosure Statement, Privacy Policies and Fee Schedule for your records.

**RETURN INSTRUCTIONS**

Return the completed forms to Pacific Premier Trust by any of the following methods:

**Upload forms to:**

[PacificPremierTrust.com/upload](https://PacificPremierTrust.com/upload)

**Fax to:** 303.614.7038

**Regular Mail:**

Pacific Premier Trust  
Processing Center  
P.O. BOX 981012  
Boston, MA 02298

**For express deliveries:**

FIS-Remittance Processing  
Loading Dock #2  
Attn: Pacific Premier Trust  
10 Dan Road  
Canton, MA 02021

**Questions?**

Call: 800.962.4238

