



Asset Acceptance

5854 S. Pecos Road, Ste. J200, Las Vegas, NV 89120 1
Ph: 877 268-9115

(04042007)

For Information Contact Summit Trust Company at 877 268-9115

Summit Account Number:

Instructions:

Complete this **Asset Acceptance Form** for transferring assets from your Account at another institution or Custodian (Bank, Broker, Investment Firm or Mutual Fund Company) and transferring the assets to your Summit Trust Company Account. (This Form is to be used for all Custody Accounts as well as Individual Retirement Accounts.)

It is recommended that you confirm with the previous Custodian to see if additional paper work is required to transfer assets. This step will help avoid delays in receiving the transfer.

If multiple Accounts and or Custodians are involved, a form for each Account and/or Custodian is required.

Failure to fully complete forms or attach appropriate documents may result in a delay for which Summit Trust Company cannot be held accountable.

Complete all appropriate sections and sign the **original copy** of this form and attach **a copy of your most recent account statement** from your current Custodian. Forward completed **original form** to address below. (Faxed forms **will not** be processed.)

Forward completed Forms to:

Summit Trust Company

5854 S. Pecos Road, Suite J200
Las Vegas, NV 89120

1. Asset Provider

Name	Contact
Address	City, State, Zip Code
Telephone Number	Email Address

2. Asset Name and Valuation

Asset Name	Asset Unit Type (Units / Shares, Percentage, etc. please describe)	
Latest Valuation	Date of Valuation	Source of Valuation

3. Asset Description

