

Entity or Trust Account Authorization Update Form



3. Update Agents with Inquiry Only Access (entity accounts only)

Tell us who is authorized to request information for this account. The individuals named below will have the right to request account information verbally but cannot make changes to an account or request trades.

If there are multiple agents, attach a list of names and provide all of the information requested here for each person.

Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Update Agents with Full Account Access (entity accounts only)

Tell us who is authorized to make investment decisions and transactions for this account. The individuals named below will have the right to request account information, make trades, and update account settings.

If there are multiple agents, attach a list of names and provide all of the information requested here for each person. Any agents listed in this section will replace any agents currently on file.

Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Agent's Signature	
<input type="text"/>	<input type="text"/>	
Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Agent's Signature	
<input type="text"/>	<input type="text"/>	
Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Agent's Signature	
<input type="text"/>	<input type="text"/>	
Agent's First Name	Middle Initial	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Agent's Signature	
<input type="text"/>	<input type="text"/>	

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5. Signature

For entity accounts, a Full Access Agent that is already on file or an agent listed in **Section 4** must sign below. If you are completing **Section 4**, your signature must be notarized in **Section 6**. For trust accounts, a trustee must sign below.

If included, I hereby certify, to the best of my knowledge, that the beneficial owner information provided on this form is complete and correct.

Agent's or Trustee's Signature

Print Agent's or Trustee's Name

Agent's Title

Date (mm/dd/yyyy)

 / /

6. Notary Acknowledgement

Your signature on this form must be notarized if you are updating Full Access Agents (Section 4).

State of _____

County of _____

On this _____ day of _____, 20 _____, before me personally appeared

_____, to me personally known to be the individual described herein and who executed the foregoing instrument, and acknowledged that he executed the same.

Notary Public

My commission expires: _____

Notary: Affix stamp here

For entity accounts, a Full Access Agent that is already on file or an agent listed in Section 4 must sign Section 5. If you are completing Section 4, your signature must be notarized in Section 6. A trustee must sign Section 5 for trust accounts.