



CLIENT PORTAL AUTHORIZATION FORM

Effective Date: _____

Account #: _____

INDIVIDUALS TO BE ADDED

Print First and Last Name

Title

Signature (*Required if Authorized Trader)

Email

Permissions (must check one): Authorized Trader to Move Funds* View Only Access

Print First and Last Name

Title

Signature (*Required if Authorized Trader)

Email

Permissions (must check one): Authorized Trader to Move Funds* View Only Access

INDIVIDUALS TO BE REMOVED

Print First and Last Name

Title

Print First and Last Name

Title

The above changes have been duly approved by two Authorized Signers:

Signature

Date

Printed Name

Title

Signature

Date

Printed Name

Title