

1 Linking Preferences

Please select only one.

STATEMENT LINKING

By selecting the Statement Linking box above, you consent to receive some or all of your eligible First Clearing monthly account statements and disclosures in one envelope along with a consolidated summary statement which will be addressed and mailed to the Authorized User. **A common postal address is required in order to link accounts.**

STATEMENT LINKING and ACCESS ONLINE ACCOUNT LINKING

By selecting the Statement Linking and Access Online Account Linking box above, you consent to having your accounts statement linked and viewable by the Authorized User named below. Additionally, you are enrolling in Electronic Householding where you consent to the attached Electronic Delivery consent for Authorized User Agreement. Electronic Householding allows the Authorized User to edit the document delivery preferences for all linked accounts.

DELINK STATEMENTS

By selecting the Delink Statements box above, you consent to delinking your account statements.

2 Consent for Authorized User

I authorize my Investment Advisor _____ and TradePMR to aggregate all of my current and future accounts for Statement Linking and/or Access Online linking per the selections marked above. I authorize _____ (Authorized User) to have access to my accounts, unless otherwise specified. This includes the ability to choose Delivery Preferences for my statements, confirmations, tax documents and other forms online. I understand that if any additional accounts are opened, the linking process is not automatic. Future requests will be made by my Investment Advisor to link additional accounts, on my behalf, to TradePMR.

If I wish to have my own Access Online, I can do so. I will be granted View Only access.

I authorize TradePMR to collect any information they choose, beyond what is provided, to verify my identity.

Note: If you do not share a common postal address with the Authorized User, an Authorization to Release Account Information Online form is required.

3 Certification – Account Holder

By signing below, you agree to the Terms and Conditions and understand and agree that the financial information and disclosures provided in the Statements for all Linked Accounts may be viewed by any and all clients to any of the linked accounts.

Account Holder Signature	Print Name	Date
Account Holder Signature	Print Name	Date
Account Holder Signature	Print Name	Date
Account Holder Signature	Print Name	Date

ANY ACCOUNT OWNER OR PERSON SIGNING ON BEHALF OF THE ACCOUNT HEREBY AGREES TO THE FOLLOWING TERMS AND CONDITIONS:

Indemnification. In consideration of Introducing Firm and First Clearing, LLC (hereinafter referred to collectively as "you") accepting the instructions on the first page of this Authorization, I hereby release and discharge you and your affiliates from any liability or claims in connection with the release of Account Information to the Authorized User and agree to indemnify and hold you harmless against any losses from any action, claim or demand of any person based upon you acting under these instructions.

Unauthorized Disclosure. I shall promptly advise you in writing of any misappropriation or unauthorized disclosure or use of my Account Information by any person other than the Authorized User which may come to my attention and to take steps reasonably requested by you to limit, stop or otherwise remedy the misappropriation or unauthorized disclosure or use.

Privacy Policy. You have each provided me with a copy of your respective Privacy Policies, which explains that customers have the ability to "opt out" of sharing information about my account. I understand that I have the right at any time to discontinue access by the Authorized User to my Account Information.

Statement Linking Terms and Conditions:

Statement Linking allows clients in the same household (a common postal address) to elect to receive some or all of your eligible First Clearing monthly account statements in one envelope along with a consolidated summary statement which will be addressed and mailed to the Authorized User's Primary Account.

TERMS & CONDITIONS

- A common postal address is required in order to link accounts.
- Monthly statements for linked accounts will be delivered in one package to the postal address of the "Primary Account" or may be accessed online with e-mail notification sent by electronic delivery (if enrolled for such delivery).
- Delivery of electronic notification by email will alert anyone with online access to any of the linked accounts and will allow all clients of the linked accounts to view the accounts within the respective client's profile. The primary account may view monthly statements of all linked accounts.
- Linked accounts that are set up for electronic delivery will not receive paper statements by mail.
- All accounts enrolled in Statement Linking shall remain linked until (i) a client requests to de-link an account, or (ii) the mailing address of one or more linked accounts is changed.
- TradePMR may require all clients for each of the accounts to be linked to agree to the terms and conditions of the Account Linking Application.
- One consolidated summary statement (containing General Instructions and disclosures and Specific Instructions and disclosures) will be delivered to the common postal address, addressed to the Primary Account. All Clients of Linked Accounts that are set up for electronic delivery may access the General Instructions and disclosures and Specific Instructions and disclosures.

Electronic Delivery Consent for Authorized User:

In this agreement, "I", "me" and "my" refer to the Registered Account Owner and all others who are legally obligated on this account.

To consent to electronic delivery, this document must be completed by the registered account owner.

My accounts are currently enrolled in Statement Linking with the account(s) of a First Clearing, LLC account owner who has enrolled in First Clearing, LLC Access Online. The Authorized User is not a registered account owner of my account. The Authorized User will have online access to all accounts grouped in my household based on address of record.

By signing this document, I hereby acknowledge, authorize and certify as follows:

1. The Authorized User is authorized to view my account(s) online via Access Online and any/all electronic documents available. I understand that I must notify my financial advisor if I wish to revoke this authorization at which time I must enroll in Access Online to continue to receive electronic delivery of account documents.
2. I consent to electronic delivery for my account(s) listed and authorize the Authorized User to set the electronic preferences for specified account documents. Specified account documents include account statements, trade confirmations, tax document, shareholder information, including proxy material and information necessary to vote proxy material, and initial trade prospectuses ("account documents"). The Authorized User is also authorized to set my electronic preferences for additional account documents that may be subsequently available for electronic delivery. I acknowledge that when such electronic preferences are set, I will no longer receive printed copies of such account documents. I understand that I may request a copy of a printed account document (without revoking my electronic preferences) or revoke my electronic preferences at any time by contacting my financial advisor. My consent will remain valid until such time as I revoke it.
3. First Clearing, LLC will provide a notification via e-mail when an account document has been posted to my account on Access Online. This e-mail will be delivered to the e-mail address provided by the Authorized User at the time of enrollment in Access Online.
4. First Clearing, LLC will post my account statements, and trade confirmations and tax documents online on Access Online. I certify that I have access to Access Online via the Authorized User's user name and password. Shareholder information and initial trade prospectuses will be delivered via a link in the e-mail notification. Additional account documents may be delivered by either method.
5. I understand that I may enroll in First Clearing, LLC's Access Online with a unique user name and password at any time.
6. I understand that First Clearing, LLC's Access Online Support may not assist me with any issues relating to an online view via the Authorized User's login.