

# DRS Transfer Authorization



## 1 Account Information

TradePMR Account Number: <i>8 digit account number with no dashes</i>	DRS Account Number: <i>Account number at the transfer agent</i>
Account Registration: <i>Title of the account as shown at the transfer agent</i>	

## 2 Account Holder Information

Client Address: <i>Client's full address as shown at the transfer agent</i>	
Street Address:	City, State, Zip:
Primary Social Security Number: <i>SSN of primary account holder at the transfer agent</i>	Secondary Social Security Number: <i>If joint account, SSN of secondary account holder at the transfer agent</i>

## 3 Transfers Instructions

CUSIPs to Transfer: <i>9 digit CUSIPs (not symbols) transferring from the transfer agent to TradePMR</i>		
CUSIP #1:	CUSIP #2:	CUSIP #3:
CUSIP #4:	CUSIP #5:	CUSIP #6:
CUSIP #7:	CUSIP #8:	CUSIP #9:
CUSIP #10:	CUSIP #11:	CUSIP #12:

## 4 Certification – ALL ACCOUNT HOLDERS, ALONG WITH ADVISOR, MUST SIGN BELOW

Prior to submitting the DRS Transfer Authorization form, clients should verify the following: that all shares are in DRS eligible accounts; that all information provided on this form is accurate; that the Account Information and Account Holder Information at the transfer agent matches the client's TradePMR account exactly. Failure to do so can result in the rejection of the DRS transfer by the transfer agent, resulting in a \$75 fee. Please call Transfers (888-723-3787, Option 4) or email [transfers@tradepmr.com](mailto:transfers@tradepmr.com) with any questions.

Account Holder Signature	Print Name	Date
Account Holder Signature	Print Name	Date
Advisor or Advisor Representative Signature	Print Name	Date