

Account Update Form



Account Information

Account Number:	Account Name:	Account Type:
1.		
2.		
3.		
4.		

Address Change

Please change the address on my account(s) to the following:

Legal Address (No PO Boxes):		
City:	State:	Zip:
Mailing Address (If different from above):		
City:	State:	Zip:

Email Address/Phone Number Change

Please change the primary email address for my account(s) to the following:

Email Address:

Please change the phone number(s) on my account(s) to the following:

Primary (required):	Business:	Other:
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Tax Lot Relief Method Change

Please change the Tax Lot Relief Method on my account(s) to the following:

- First In First Out (FIFO) Highest In First Out (HIFO) Highest Cost Short Term (HCST) Lowest Cost Long Term (LCLT)
 Last In First Out (LIFO) Lowest Cost First Out (LOFO) Highest Cost Long Term (HCLT) Lowest Cost Short Term (LCST)

Duplicate Statements/Confirmations

Please send duplicate Statements, Confirmations, and/or 1099s to the following:

Name:	Address:		
City:	State:	Zip:	

Advisor Permission Change

Please update the Advisor's Permissions on my account(s) to the following:

Advisor Name:	
<input type="checkbox"/> Accept <input type="checkbox"/> Decline	I hereby grant a limited Power of Attorney to the Advisor to exercise discretionary power over this account and to make investment decisions without prior consent as outlined in the investment advisory agreement between the Advisor and the Account Holder.
<input type="checkbox"/> Accept <input type="checkbox"/> Decline	I hereby authorize Trade-PMR, Inc. to pay my Advisor's fees from my account as directed by my Advisor.

□ Cash Sweep Selection Change

In accordance with the terms of the account, I select the following option for the automatic investment of interest and dividend income as well as any other cash balances in my account. In absence of a selection, I agree that my cash will be placed in the Bank Deposit Account.

<p>Cash Sweep Option. <i>Please select only one.</i> (If left unchecked, 'FDIC-Insured Sweep' will be selected):</p> <p><input type="checkbox"/> FDIC-Insured Bank Deposit Sweep</p> <p><input type="checkbox"/> Do not sweep proceeds to Money Market</p>	<p><i>For Individual/Joint/Custodian Accounts Only</i></p> <p>Mail Checks for Cash Dividends/Interest (Optional, select only one):</p> <p><input type="checkbox"/> Mail Checks: Daily</p> <p><input type="checkbox"/> Mail Checks: Semi-Weekly</p> <p><input type="checkbox"/> Mail Checks: Monthly</p>
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□ Occupation/Employer Change

Please update the Occupation/Employer information on my account(s) to the following:

Occupation (Select only one):			
<input type="checkbox"/> Administrative, Clerical	<input type="checkbox"/> Clergy	<input type="checkbox"/> Craftsman/Skilled Worker	<input type="checkbox"/> Education
<input type="checkbox"/> Homemaker	<input type="checkbox"/> Information Tech	<input type="checkbox"/> Personal Service Provider	<input type="checkbox"/> Proprietor/Professional
<input type="checkbox"/> Public Services	<input type="checkbox"/> Retired	<input type="checkbox"/> Sales	<input type="checkbox"/> Student
<input type="checkbox"/> Unemployed	<input type="checkbox"/> Farming/Fishing/Forestry		
Employer Name: (If retired, please list previous employer)			
Employer Address:			
City:	State:	Zip:	

□ Issuer Communications and Related Actions

If you have granted your RIA trading authority over your account, and your RIA exercises investment discretion for you pursuant to an advisory contract, you can appoint your RIA to be sent certain issuer and issuer-related communications (proxies, tender offers, proposed mergers, rights offerings, exchange offers and warrants, among other things) that may require a voting decision or other action regarding investments held in your account.

If you appoint your RIA below, your RIA will, regarding only those voting decisions or other action communications sent to your RIA: (i) be requested to vote proxy ballots; (ii) be requested to provide instructions regarding corporate reorganizations and other corporate actions; and (iii) be sent certain prospectuses and annual reports and other communications. In these cases, you will be authorizing your RIA to make all voting decisions and take all actions on your behalf. You will not be sent informational copies of these communications.

Even if you appoint your RIA below, you may still be sent certain other issuer and issuer-related communications regarding investments held in your account. You agree that you will be responsible for providing TradePMR/First Clearing* any applicable instructions or directions on these items.

Please select only one:

- Yes.** I appoint my RIA as described above. I instruct TradePMR/First Clearing not to disclose my name, address and securities positions to any issuer of securities held in my account.
- No.** I do not appoint my RIA as described above. I wish to be sent all issuer and issuer-related communications, make all voting decisions and take all actions described above. I understand that any issuer of securities held in my account may request that TradePMR/First Clearing disclose to it my name, address and securities positions in that issuer.

Certification

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

*Account(s) carried by First Clearing. First Clearing is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.