

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:

Change only the legal address (this will not change the mailing address on the account)

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:

Risk Tolerance/Investment Objective Change

Please change the Risk Tolerance/Investment Objective on my account to the following:

Conservative/Income*

Moderate/Income

Long-Term/Income

Conservative/Growth & Income*

Moderate/Growth & Income

Long-Term/Growth & Income

Conservative/Growth*

Moderate/Growth

Long-Term/Growth

*Trading will be restricted to investment grade bonds and money market funds

Trading & Speculation

Tax Lot Relief Method Change

Please change the Tax Lot Relief Method on my account 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 and confirmations to the following (e.g., CPA, TPA, Attorney, etc.):

Name:

Address:

City:

State:

Zip:

Certification – ALL ACCOUNT HOLDERS MUST SIGN

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