

Letter of Authorization to request Check or Journal Transfer

This form may be used for non-qualified accounts and qualified account journal contributions only. For all other check or journal qualified account distributions, please use the "Distribution Request from an IRA" form or "Distribution for Qualified Plans" form.

	mation							
Advisor (or RIA Firm Name)				Advisor Code				
2 Account Info	rmation							
Account Type Account Type				Account Title				
3 Transfer Insti	ructions							
Purpose for Transfer	(required for	UTMA ,	/ UGMA / Third-Party	<i>/)</i> :				
4 Check Transf	ers							
Transfer Type								
☐ One Time Check								
Deposit to Other Fina	ncial Instituti	on from	TradePMR and trans	sfer \$			immediately.	
☐ New ☐ Cancel		On-De	emand Check (Standi	ng Instructions)				
On-Demand Check all account upon request		ansfer f	funds via check from	your TradePMR acc	ount to an Ou	ıtside Fina	incial Insti	tution
Standing Instruction:	Transfer amo	unt not	to exceed this dollar	value: \$				
(Transfer at client's di	scretion with	the am	ount not to exceed th	ne above specified th	hreshold)			
☐ New ☐ Cancel	☐ Update	Period	dic Check Deposits to	Other Financial Ins	stitution			
Cash Amount:	Start Date (re	equired):	End Date:	Frequency (require	·			□ n :
				☐ One-time ☐ Semi-Monthly	\square Daily \square Monthly	□Weel □Bi-M	•	☐ Bi-Weekly ☐ Quarterly
					□Annually			· · · · · · · · · · · · · · · · · · ·
	☐ Dividends			☐Semi-Annually			Business Da	ay of Month
	☐ Dividen	ds	☐ Interest	☐ Capital Gains [☐ Partne	rship Dist	
Variable Transfers: (Choose all that apply)	☐ Dividen☐ Principa		Return of	· · · · · ·	Dist	☐ Partne	ership Dist	-
		al		☐ Capital Gains [Dist cipal	☐ Partne☐ Divide☐ outsid	rship Dist	Securities held
	☐ Principa	ies	Return of Capital	☐ Capital Gains [☐ Return of Prince	Dist cipal	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply)	☐ Principa☐ Maturiti	il ies ie):	Return of Capital Liquidation	☐ Capital Gains I☐ ☐ Return of Princ ☐ Free Credit Ba	Dist cipal	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply) Delivery Instructions (S Mail Check – Third Pa Standard Mail	☐ Principa☐ Maturiti ☐ Maturiti Select only on arty OR Specia	il ies ie): al Instru	Return of Capital Liquidation	☐ Capital Gains I☐ ☐ Return of Princ ☐ Free Credit Ba	Dist cipal	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply) Delivery Instructions (S Mail Check – Third Pa Standard Mail Overnight Mail (A	☐ Principa☐ Maturiti ☐ Maturiti Select only on arty OR Specia	il ies ie): al Instru	Return of Capital Liquidation	☐ Capital Gains I☐ Return of Princ☐ Free Credit Ba	Dist cipal lance	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply) Delivery Instructions (S Mail Check – Third Pa Standard Mail	☐ Principa☐ Maturiti ☐ Maturiti Select only on arty OR Specia	il ies ie): al Instru	Return of Capital Liquidation	☐ Capital Gains I☐ ☐ Return of Princ ☐ Free Credit Ba	Dist cipal lance	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply) Delivery Instructions (S Mail Check – Third Pa Standard Mail Overnight Mail (A	☐ Principa☐ Maturiti Select only on arty OR Special fee may apparent	nies ne): al Instru	Return of Capital Liquidation uctions (Client may b	☐ Capital Gains I☐ ☐ Return of Princ ☐ Free Credit Ba e called to verify.) Account Number	Dist cipal lance	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply) Delivery Instructions (S Mail Check – Third Pa Standard Mail Overnight Mail (A Payee/Recipient	☐ Principa☐ Maturiti Select only on arty OR Special fee may apparent	nies ne): al Instru	Return of Capital Liquidation uctions (Client may b	☐ Capital Gains I☐ ☐ Return of Princ ☐ Free Credit Ba e called to verify.) Account Number	Dist cipal lance	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held
(Choose all that apply) Delivery Instructions (S Mail Check – Third Pa Standard Mail Overnight Mail (A Payee/Recipient Payee/Registrant's Ac	☐ Principa☐ Maturiti Select only on arty OR Specia fee may appa ddress (includ	nies ne): al Instru	Return of Capital Liquidation uctions (Client may b	☐ Capital Gains I☐ ☐ Return of Princ ☐ Free Credit Ba e called to verify.) Account Number	Dist cipal lance	☐ Partne☐ Divide☐ outsid	ership Dist nds from S e of firm	Securities held

5 Journal Transfers

Journal to another	TradePMR Account (required):						
Receiving Accou	nt Number Receiving Acc	ount Title					
Transfer Type							
One Time Journa							
_	all funds and securities from the fer residual assets up to 90 day						
	er select funds and/or securities						
_	disbursement: \$. ,	Enter specific amount or	"ALL".			
☐ Secur	rity disbursements: All Sec	urities OR \square Securiti	es listed on the table below	w*			
☐ New ☐ Cand	cel On-Demand	Journal (Standing Inst	ructions)				
On-Demand Jour	nal allows you to transfer funds	and securities betwee	en accounts at TradePMR.				
Standing Instruct	ion: Transfer amount not to exc	ceed this dollar value:	\$				
(Transfer at client	t's discretion with the amount r	ot to exceed the above	e specified threshold)				
Number of Shares/Contracts (or for standing instructions, list not to exceed quantity)	Security Description	Symbol or CUSIP	Cost Basis Instructions (OPTIONAL)	For standing instructions, provide maximum market value based on prior business day's closing value			

^{*}If needed, attach an additional signed Securities Listing on a separate sheet.

Continued Journal Transfers

☐ New ☐ Cancel	☐ Update	Periodic Journal Transfers to Another TradePMR account (securities not allowed)						
Cash Amount:	Start Date (required):		End Date:	Frequency (required):				
				□One-time	\square Daily	\square Weekly	\square Bi-Weekly	
				☐Semi-Monthly	\square Monthly	\square Bi-Monthly	\square Quarterly	
				☐Semi-Annually	\square Annually	☐ Last Business □	Day of Month	
Variable Transfers: (Choose all that apply)	☐ Dividend	ds	□ Interest	☐ Capital Gains Dist ☐		☐ Partnership Dis	Partnership Dist	
	☐ Principa	I	☐ Return of Capital	☐ Return of Principal		Dividends from Securities held outside of firm		
	☐ Maturiti	es	☐ Liquidation	☐ Free Credit Balance		☐ MM Fund Balance		

6Certification

In consideration for Trade-PMR, Inc. ("TradePMR") accepting the instructions provided on this document, Account Holder(s) release and discharge both TradePMR and its clearing firm, Wells Fargo Clearing Services, LLC* ("First Clearing"), and their respective affiliates from any liability or claims in connection with these instructions and agree to indemnify and hold TradePMR and First Clearing harmless against any losses from any action, claim, or demand of any person based upon either TradePMR or First Clearing acting upon these instructions.

For transfers to third-party accounts in which Account Holder(s) have no ownership interest, Account Holder(s) agree that, by signing this document, Account Holder(s) is irrevocably relinquishing all rights, title, and interest to the assets contemplated to be transferred via the instructions provided on this document. Account Holder(s) acknowledges that it is Account Holder's responsibility to verify the accuracy and the legitimacy of the source of instructions provided by third-parties, such as but not limited to, title companies, attorneys, accountants and business associates, for transfers from Account Holder's account.

Account Holder(s) acknowledge having received, read and understand the terms of this request to establish a standing letter of instruction to transfer Account Holder's assets and further acknowledges that the terms of this request are binding, regardless of any other agreement(s) between Account Holder and the recipient(s) of these assets.

Account Holder(s) acknowledges that any required notifications confirming these instructions will be provided by TradePMR. Account Holder(s) acknowledge that this document authorizes the Account Holder's Advisor, as listed below, to direct transfers to third-parties, either on the schedule specified on this form or from time to time. Account Holder(s) has the authority to terminate or change these instructions at any time.

Do not sign below unless you have read and understand all terms and conditions on this form.

Account Holder Signature	Name (Please Print)	Date
Additional Account Holder Signature	Name (Please Print)	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.