

Account Update Form



Account Information

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

Address

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

Legal Address (No PO Boxes):

City:	State:	Zip:
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Mailing Address (If different from above):

City:	State:	Zip:
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Email Address/Phone Number – Changes will not update your Access Online account, which must be done online.

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

Email Address:	Secondary Email Address: (optional)
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Please change the phone number(s) on my account(s) to the following:

Primary Phone (required):	Additional Phone: (optional)
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Tax Lot Relief Method

Please change the Tax Lot Relief Method for 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)

Equity Dividend Reinvestment

Please change the Equity Dividend Reinvestment for my account(s) to the following:

- Reinvest dividends
 Do not reinvest dividends

Interested Party- Add Interested Party Remove Interested Party

Statements and/or Confirmations to the following party:

Name:	Address:		
City:	State:	Zip:	

☐ Cash Sweep Selection

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.

Cash Sweep Option. (Select only one):

- FDIC-Insured Bank Deposit Sweep
- Do not sweep proceeds to Money Market

Dividends/Interest Preference. (Select only one):

**Not available for IRA accounts.*

- Post to Account
- Mail Checks: Daily
- Mail Checks: Semi-Weekly (Tuesdays and Fridays)
- Mail Checks: Monthly (First Business Day)

☐ Occupation

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:

☐ Advisor Permission

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

Firm Name:

- Accept
- Decline

I hereby authorize Trade-PMR, Inc., to accept and act on instructions from my Advisor to deduct advisory fees from my account(s). I have entered into an advisory agreement with my Advisor, which gives my Advisor authority to submit advisory fee billing instructions to Trade-PMR, Inc.

If you would like to add or update your existing Trusted Contact Person for any account(s) listed above, please complete a Trusted Contact Person Authorization form for that account. When designating a trusted contact, you are giving TradePMR permission to contact and discuss with that individual concerns the firm may have regarding the health and/or welfare of you or potential fraudulent activity in your account(s). The Trusted Contact Person Authorization form can be found at www.tradepmr.com and returned to New Accounts using the instructions listed on the bottom of this update form.

Certification

*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.

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