



Thank you for opening an account with your Investment Advisor at TradePMR.

At TradePMR, our mission is to provide your Investment Advisor with the support and brokerage services necessary to manage your account.

**Account Profile:**

You will or may have already received a packet from the custodian, First Clearing\*, containing their account agreement and disclosures. We encourage you to carefully review the packet in its entirety.

**Online Access to Account Information:**

All account holders can view account information on-demand through Access Online hosted by Wells Fargo Online. The portal offers up-to-date, detailed information about your accounts, secure access to online statements, trade confirms and tax documents. Account information can be downloaded into Quicken, TurboTax and Excel. Once login credentials are established, you can also manage your account's delivery preferences, which will default to online delivery unless you specifically request for paper.

Instructions on how to sign up and login to Access Online were included with the disclosures provided to you by your Financial Advisor at account opening. If you have existing Access Online credentials, new accounts will be automatically linked to your established user ID.

**Enclosures (2):**

Designation of Responsibilities for Your Account

Viewing Your Client Agreement

\*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.



## Designation of Responsibilities for Your Account

TradePMR is solely responsible for opening and approving your brokerage account. This may include obtaining and recording certain required information about you.

### **Monitoring Account**

Your investment advisor is independent and unaffiliated with TradePMR and is solely responsible for:

- Receiving and reviewing any financial or personal information about you and your investment objectives.
- Determining if a specific investment strategy is suitable or appropriate for you.
- Supervising the volume of activity, or any other matter regarding the quantity, quality, or specifics of any securities or options transaction in your account.
- Making recommendations regarding a specific security investment strategy.
- Providing you with research or market interpretations regarding the advisability of purchasing or selling a specific security.

If you do not have an investment advisor, or if you terminate your relationship with your investment advisor, you will be solely responsible for the investments in your account.

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## Viewing Your Client Agreement

You have already received a copy of your client agreement, which was attached to your new account application. If you need a new copy of your client agreement, you may request a paper copy by contacting us or you may access it online at [www.TradePMR.com](http://www.TradePMR.com).