



# Letter of Authorization to Wire Funds

- This form is for domestic wire transfers only (wires sent to the United States, Guam, Puerto Rico, the U.S. Virgin Islands, American Samoa and the Northern Mariana Islands).
- We may need to confirm your instructions prior to processing your request. If we contact you for confirmation and there are differences between the instructions you give us by telephone and the information included in this form, we require that you submit a new wire transfer request with the correct information.
- You may be charged a wire transfer fee of US\$20.
- A TradePMR associate may call the client to verify the instructions.

**Please remember to:**

- Complete all required fields to avoid delays.
- Verify the destination bank’s routing information to avoid losing the amount transferred.
- Use the Distribution Request from IRA form to request distributions from IRA, SEP-IRA, or SIMPLE IRA.
- Use the ESA Distribution Request form to request distributions from education savings accounts (ESAs).

## 1 Advisor Information

Advisor (RIA Firm Name)

Advisor Code

## 2 Originator’s Information

Account Title *(as it appears on your account):*

Registration Type *(Individual, IRA, Trust, etc.):*

Account Number:

Wire Amount:

## 3 Beneficiary/Recipient Information

Beneficiary/Recipient Name:

Purpose of Wire:

Beneficiary Address, City, State, Zip: *(Cannot be a P.O. Box or APO)*

## 4 Beneficiary Bank Information

Bank Name:

Bank Address, City, State, Zip, Country:

ABA Routing Number:

Bank Account Number:

## 5 Standing Instructions

Wire funds Standing Instructions – allows you to establish standing instructions to transfer funds electronically between Other financial Institution account and TradePMR account upon request.

New  Cancel

\*Standing Instruction: Transfer amount not to exceed this dollar value

*(Transfer at client's discretion with the amount not to exceed the above specified threshold)*

*\*RIA must accept custody in order to establish standing instructions for third-party transactions*

## 6 For Further Credit – If Applicable

Account Number:

Reference Information:

## 7 Certification

Trade-PMR, Inc. and First Clearing\* (hereinafter referred to as "us" or "we") cannot guarantee that the destination bank will post the wired funds for same-business-day credit. However, in most instances within the U.S., transfers are received by the destination bank on the same business day that we wire them.

**You agree that funds must be available on the date of the proposed transfer or your wire may be delayed. You may be required to provide us with additional information if you are withdrawing funds within 90 days of opening your account.**

You authorize us to wire funds from your account pursuant to the above instructions.

You hereby agree to indemnify and hold us harmless from and against any loss, claim, damage or liability arising out of or resulting from any action taken by us in reliance upon instructions provided in this form that we in good faith believes to be genuine.

We reserve the right to refuse to act upon any instructions that cannot be verified as accurate and/or authorized by the client.

Your wire transfer is also subject to the terms and conditions of your Client Agreement.

**Please note:** If this is a custodial account for a minor, you represent that the funds will be used or applied solely for the benefit of the minor.

Your signature below confirms your request to initiate the wire transfer described above and your agreement to the above terms and conditions. You also agree that if you describe any beneficiary or financial institution by name and account or identifying number, we and other institutions may process the wire based solely on that number, even if it identifies a different person or entity. If you provide an incorrect account number, you could lose the amount transferred. We may refuse to act upon any instruction that we cannot verify as accurate and authorized by you.

Account Holder Signature	Print Name	Title	Date
Additional Account Holder Signature	Print Name	Title	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.