



**2. INVESTOR'S FINANCIAL ADVISOR INFORMATION**

This section must include information for both the Financial Advisor and the Financial Advisor's Institution in order to add a Financial Advisor to the account. Please note, the investor must sign in the "Investor's Signature" section (section 3) in order to grant consent for the investor's Financial Advisor and Financial Advisor's Institution to have view-only access to all account information. If any part of this section is left blank or is incomplete, no Financial Advisor will be added to the account and the Financial Advisor will not have access to the Advisor Portal.

**Note:** If your account is managed by a custodian or broker (including non-qualified broker-controlled accounts and qualified IRA accounts) please also advise your custodian or broker of the change in your advisor.

**FINANCIAL ADVISOR INFORMATION**

Name

**A**

CRD Number Assigned by FINRA **B**  Telephone Number (do not use hyphens) **C**  Ext.

E-mail Address (This email address will be used as the login username on Computershare's advisor portal)

**D**

Street Address / PO Box **E**  Apt. / Unit Number

City **F**  State  Zip Code

**FINANCIAL ADVISOR'S INSTITUTION INFORMATION**

Financial Institution Name

**G**

CRD Number Assigned by FINRA **H**  Telephone Number (do not use hyphens) **I**  Ext.

Street Address / PO Box **J**  Apt. / Unit Number

City **K**  State  Zip Code

**3. INVESTOR'S SIGNATURE**

By signing below, the investor(s) gives consent to Computershare to grant view-only access of all account information to the Financial Advisor and the Financial Advisor's Institution if provided in section 2 above. Such consent will remain in place until the account holder notifies Computershare to revoke such consent.

Signature 1  Signature 2 (if applicable)  Date (mm / dd / yyyy)

Mail completed form to:

**Regular Mail:**

Computershare  
PO Box 43007  
Providence, RI 02940-3007

**Overnight/certified/registered delivery:**

Computershare  
150 Royall Street, Suite 101  
Canton, MA 02021

For additional inquiries, please e-mail us at [advisorportalsupport@computershare.com](mailto:advisorportalsupport@computershare.com).

