ForgeTrust

LIMITED POWER OF ATTORNEY (LPOA) FOR INVESTMENT ADVISOR

Contact Center: (800) 248-8447 | www.ForgeTrust.com

Use this form to grant limited authority over your existing retirement account at Forge Trust Co. to the Investment Advisor named below.

1. PERSONAL INFORMATION (*required field)

Should Forge Trust Co. need to contact you in regards to this request, your preferred method of contact is:

☐ Email

☐ Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* Last 4 Digits Only	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. INVESTMENT ADVISOR INFORMATION—TO BE COMPLETED BY ADVISOR

Advisory Firm Name	Investment Advisor Master Account Number
Service Team	

Advisor Contact Information (if follow-up is required)

First Name*	Middle Name		Last Name*
Address			
City	State	Zip	Country
Evening Phone XXX-XXX-XXXX	Daytime Phone XXX-XXX-XXXX		Email

Prior Investment Advisor Firm

Please complete if authorization below replaces authority previously delegated.

Is your firm (or a principal, employee or related person* of your firm) an owner, trustee, executor, guardian, conservator or custodian of this account?

Yes ◯ No ◯

If "yes," is it intended that this account will hold assets belonging to persons or entities other than your firm, your firm's employees or yourself, or relatives of you or your firm's members?

Yes ◯ No ◯

**A "related person" is defined as any advisory affiliate or any person who is under common control with your firm.*

3. ACCOUNT OWNER AUTHORIZATION (Please select all that apply)

You may change or revoke these Authorizations at any time by providing written notice to Forge Trust Co..

☐ **Investment and Disbursement Authorization**
By checking the box and signing this form, I authorize Forge Trust Co. (1) to execute trades in my retirement account at the direction of Investment Advisor as provided in the Limited Power of Attorney (LPOA) Agreement; (2) to submit Investment Authorizations to Forge Trust Co. for my account, or disbursements to me personally, as instructed by Investment Advisor; (3) to remit checks, wire funds and otherwise to make disbursements of funds held in the retirement (i) to banks, broker-dealers, investment companies or other financial institutions for credit to an account of identical registration or (ii) to me at my address of record. (Note: This option is not available for Estate, Guardianship, Conservatorship, Individual 401(k), Qualified Retirement Plan, Fiduciary Trust or Inherited IRA accounts in the name of the aforementioned account types.)

☐ **Investment Authorization**
By checking the box and signing this form, I authorize Forge Trust Co. to execute trades in my retirement account at the direction of Investment Advisor as provided in the Limited Power of Attorney (LPOA) Agreement.

☐ **Fee Payment Authorization**
By checking the box and signing this form, I authorize Forge Trust Co. to pay investment advisory and related fees to Investment Advisor from my retirement account in the amount of my Investment Advisor's instructions.

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4. INVESTMENT COMMUNICATIONS AND RELATED ACTIONS

If you have granted your Investment Advisor investment authority over your retirement account, and your Investment Advisor exercises investment discretion for you pursuant to an advisory contract, you can appoint your Investment Advisor to be sent certain issuer and issuer-related communications (proxies, tender offers, proposed mergers, rights offerings, exchange offers and warrants, among other things) that may require a voting decision or other action regarding investments held in your retirement account. If you appoint your Investment Advisor below, your Investment Advisor will, regarding only those voting decisions or other action communications sent to your Investment Advisor: (i) be requested to vote proxy ballots; (ii) be requested to provide instructions regarding corporate reorganizations and other corporate actions; and (iii) be sent certain prospectuses and annual reports and other communications. In these cases, you will be authorizing your Investment Advisor to make all voting decisions and take all actions on your behalf. You will not be sent informational copies of these communications.

Even if you appoint your Investment Advisor below, you may still be sent certain other issuer and issuer-related communications regarding investments held in your retirement account. You agree that you will be responsible for providing Forge Trust Co. any applicable instructions or directions on those items.

If you do not select either "Yes" or "No" above, Forge Trust Co. will deem you to have indicated "No."

Please select only one:

- ◯ Yes. I appoint my Investment Advisor to receive all investment communications, and I will fulfill my responsibilities, as described above.
- ◯ No. I do not appoint my Investment Advisor as described above. I wish to be sent all Investment and investment-related communications, make all voting decisions and take all actions described above. I understand that any issuer of investments held in my retirement account may request that Forge Trust Co. disclose to it my name, address and securities positions in that investment.

5. ACCOUNT OWNER SIGNATURE

The terms "I," "me" and "my" refer to the Account Holder. By signing below, I authorize the Investment Advisor (IA) named on page 1 of this document to be my Agent (attorney-in-fact) to the extent provided in this Limited Power of Attorney (LPOA) document. Further, I certify that I have read carefully the provisions of this LPOA document. By signing this Limited Power of Attorney, below certifies that the representations and warranties are true and complete.

Furthermore, by signing this agreement, I acknowledge that these terms relate to my account and are part of (A) the Custodial Account Agreement between me and Forge Trust Co. for my Forge Trust Co. account. Additionally, by signing this Agreement, the Account Holder consents to Forge Trust Co.'s: (i) sending, by mail, electronic delivery and/or other means, duplicate copies of account trade confirmations, account statements and any other information relating to the Account Holder and the account to the Account Holder's Investment Advisor, if and in such manner as requested by the Account Holder's Investment Advisor; (ii) sending such information about the Account Holder and the account to third parties (such as CPAs or performance-reporting companies) as the Account Holder's Investment Advisor shall direct Forge Trust Co.; and (iii) disclosure of information about the Account Holder and the account to other third parties as provided in this LPOA and the Account Agreement. Furthermore, I acknowledge that I have received a copy of the Account Terms to retain for my records.

The Account Holder must sign and date below.

By signing below, I authorize Forge Trust Co. to provide Investment Advisor any and all requested information of any nature whatsoever regarding my retirement account, including, but not limited to, copies of my account statements, applications or like documentation.

Account Owner Signature ✕	Date (MM/DD/YYYY)
Account Owner Printed Name	

Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
newaccounts@ForgeTrust.com

Fax
(650) 745-2902

Regular mail
Forge Trust Co.
PO Box 2048
San Francisco, CA 94126

Overnight mail
Forge Trust Co.
4 Embarcadero Ctr, Floor 15
San Francisco, CA 94111

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These terms relate to your Forge Trust Co. retirement account and are part of the Custodial Account Agreement between the Account Holder and Forge Trust Co.. Please retain for your files.

Investment Authorization. If I have indicated on this LPOA that the Investment Advisor ("IA") named above will have the authority to direct Forge Trust Co. to submit investment authorizations to Forge Trust Co. for my Account, I authorize Forge Trust Co. to accept those instructions from IA regarding my Account, and to take all other actions necessary or incidental to the execution of such instructions, as IA shall direct.

Disbursement Authorization. If I have indicated on this Application that my IA will have investment and disbursement authority over my Account, I authorize Forge Trust Co. to disburse assets from my Account for investment purposes, and funds to me personally, as instructed by my IA. On my IA's instruction, Forge Trust Co. is authorized to remit checks, wire funds, and otherwise make disbursements of funds held in my Account to:(1) banks, other broker-dealers, investment companies or financial institutions to or for credit to an account of identical registration; or (2) to me at my address of record.

Fee Payment Authorization. If I have indicated on this Application that my IA will have fee payment authority over my Account, I authorize Forge Trust Co. to pay investment advisory and related fees from my Account to my IA in the amount of my IA's instructions. I have authorized my IA in writing to receive fee payments directly from my Account. Forge Trust Co. may rely on the instructions submitted by my IA, and will have no responsibility to confirm those instructions with me or verify the fees. Forge Trust Co. may redeem custodial cash in my Account to the extent necessary to pay these fees. My IA's fees debited from my Account will appear on Forge Trust Co.'s statements of my Account.

Forge Trust Co. Responsibilities. I acknowledge and agree that: Forge Trust Co. will merely carry out transactions as directed by me and/or IA as the case may be; I (and not Forge Trust Co.) am responsible for investigating and selecting IA; IAs are not affiliated with, or controlled or employed by Forge Trust Co.; and Forge Trust Co. has no duty to supervise or monitor trading by me or by IA, in my Account. Forge Trust Co. will send me quarterly statements of all activity in my Account. I authorize Forge Trust Co. to obtain from IA, and IA to provide to Forge Trust Co., information regarding my Account as Forge Trust Co. may reasonably request. If my IA and/or I direct Forge Trust Co. to act as custodian of non-publicly traded assets, I acknowledge and agree: (1) that non-publicly traded assets generally lack a liquid market and that the value of such assets may be difficult to ascertain; (2) that any estimated value reflected on my account statement or other communication from Forge Trust Co. is for informational purposes only and may be significantly different from the actual market value or the liquidation value of such assets; (3) that Forge Trust Co. has no responsibility for, nor does Forge Trust Co. guarantee the accuracy of, any such valuation of assets, even if the assets have been valued by a pricing service selected by Forge Trust Co.; (4) that Forge Trust Co. may require that I sign an addendum to my Account Agreement if Forge Trust Co. agrees, in the exercise of its discretion, to accept custody of any non-publicly traded assets in my Account. I authorize Forge Trust Co. to obtain from IA, and IA to provide to Forge Trust Co., information regarding my Account as Forge Trust Co. may reasonably request. If any of IA's employees is associated with a member of the Financial Industry Regulatory Authority (FINRA) or affiliate, Forge Trust Co. is authorized to deliver information concerning my Account to such member upon request. I am solely responsible for (i) the decision to hire IA, (ii) what authority to give IA and (iii) evaluating IA's services and performance; and (B) Forge Trust Co. (i) does not supervise IA and (ii) takes no responsibility to monitor IA's performance or transactions in the Account.

Termination of Authorizations. The authorizations I have granted in this LPOA will remain effective until I or IA have revoked or terminated any of them by giving notice to Forge Trust Co., either by mail, telephone, facsimile, telegraph, messenger, electronic mail, voice mail or otherwise, provided, however, that Forge Trust Co. reserves the right to require written notice or confirmation that such authorization has been terminated or revoked. I understand that I may revoke or terminate all authorizations or designations conferred herein at any time. Unless revoked or terminated by me, all authorizations and designations conferred herein to IA shall continue to apply to IA's successors or assigns. Such revocation will not affect my obligation resulting from transactions initiated prior to Forge Trust Co.'s receipt of such notice. I understand that if Forge Trust Co. terminates its IA Service Agreement with IA, Forge Trust Co. will not be obligated to honor any further instructions from IA; I will have exclusive control over, and responsibility for, my Account; and unless Forge Trust Co. notifies me otherwise, my Account will become a Forge Trust Co. retirement account subject to all terms and conditions applicable thereto, including fees and commissions, investment products and other services available to Forge Trust Co. customers. Forge Trust Co. will notify me as soon as reasonably possible after any such termination.

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