



You must complete this authorization form to allow your Representative to gain access to your account information.

This form does not authorize your Representative to execute any transactions on your behalf, nor does it authorize them to give us verbal confirmations regarding investments, distributions and expense payments on your behalf.

To remove and/or replace a Representative on your account, please complete Section 3 of this form.

To change your "Primary Contact" designation, complete Section 4 of this form.

## 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)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (your personal email only)	

## 2. ACCOUNTS INVOLVED (Add, change or remove of representative will be applied to accounts you indicate.)

ALL accounts associated with:

Social Security or Taxpayer ID Number

ONLY on these accounts:

Account Number	Account Number	Account Number
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## 3. ADD A REPRESENTATIVE TO MY ACCOUNT (\*required field)

Representative First Name*		Representative Last Name*	
Representative Phone* XXX-XXX-XXXX		Representative Email*	
Firm/Company Name	Firm Phone XXX-XXX-XXXX	Firm Fax XXX-XXX-XXXX	
Address*			
City*	State/Province*	Zip/Postal Code*	Country*

Designate this Representative as a "Primary Contact"?

YES

Select this option if this Representative is to be contacted first should any questions or concerns arise regarding your account. NOTE: Should we require a verbal confirmation of your investment, distribution and expense payment requests, we will contact you, not your designated Primary Contact.

NO

Select this option if this Representative is NOT to be contacted first should any questions or concerns arise regarding your account (default if neither option is selected).

### Authorization & Acknowledgment

By signing Section 5 below, I hereby authorize Forge Trust Co. as Custodian, and their affiliates, to allow the aforementioned Representative to:

- Access my account information, including copies of my account statements, tax filings and online account information.
- Contact Forge Trust Co. to discuss my account holdings and activity.
- Receive email notifications from Forge Trust Co. regarding my account.

I hereby acknowledge that the aforementioned Representative does not have the authorization to execute any transactions on my behalf without a Power of Attorney.

**4. REMOVE A CURRENT REPRESENTATIVE** (Complete this section only if you wish to remove a representative from your account)

Name of Current Representative
I wish to remove the above-named Representative from my account.
I wish to replace the above-named Representative with the person named in Section 3.

**5. CHANGE "PRIMARY CONTACT" DESIGNATION**

Name of Current Representative
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Select one of the following options:

Remove the "Primary Contact" status of the above-named current Representative. This Representative is NOT to be contacted <u>first</u> should any questions or concerns arise regarding my account; please contact me instead.
I would like to designate the above-named current Representative as a "Primary Contact". I would like you to contact him/her first should any questions or concerns arise regarding my account. <i>NOTE: Should we require a verbal confirmation of your investment, distribution and expense payment requests, we will contact you, not your designated Primary Contact.</i>

**6. PARTICIPANT SIGNATURE**

Participant Signature	Date (MM/DD/YYYY)
X	

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 7080  
San Carlos, CA 94070-7080

**Overnight mail**  
Forge Trust Co.  
1160 Industrial Road, Suite 1  
San Carlos, CA 94070-4128