

Instructions: Please send the completed form to SEI Brokerage Services, 1 Freedom Valley Drive, Oaks, PA 19456 or Fax to 484-676-1080.

1 Client Information

Client/Company Name(s) _____

Client Contact Name (Last) _____ (First) _____ (Middle) _____

Email Address _____ Contact Phone Number _____

Mailing Address _____

City _____ State _____ Zip Code _____

2 Client Account Number(s) and/or Money Manager Account Number(s) - Located on top of current statement, please specify below:

3 Access Level - Select only one option below:

Basic Access
View trade detail and statements. User has access to all current and historical statements.

OR

Approval Enabled Access
View trade detail and statements. User has access to all current and historical statements. Approval Enabled Access allows the user to designate full or partial payments or to deny approval of an invoice.

4 Security - Answer any **two** of the questions below; the following serve as security measures to confirm your identity.

Mother's Maiden Name _____ Last 4 digits of Social Security Number _____

Place of Birth _____ Date of Birth _____

Additional Comments/Notes:

5 Signature Authorization

Please read all terms and conditions of use carefully before using the website. By using the Website, you signify your assent to all terms of use.

Authorized Signature _____ Name and Title (please print) _____ Date _____

Trading and brokerage services are provided by SEI Investment Distribution Co. (SIDCO) 610-676-STAR, a registered broker/dealer, member of NASD/SIPC, and wholly-owned subsidiary of SEI Investments Company, 1 Freedom Valley Drive, Oaks PA 19456, 610-676-1000.