

Statement Consolidation Householding

Through a process called householding, the system can group your related accounts together for mailing and financial reporting. This offers you added convenience and will not change the frequency or timing of your statements. You will receive a consolidated cover sheet, which includes a combined portfolio value and combined income and distributions for all of your accounts. Attached to this cover sheet will be statements for each of your accounts.

Please use this form to initiate or cancel householding.

Check here to initiate Householding

- Please complete the information below for all accounts to be househanded.
- All accounts must have the same mailing address as the primary account.
- To add an account currently registered to another address, please check "Change of address required" to authorize a change of address.
- All account owners must sign where indicated for householding to begin.

Check here to cancel existing Householding

- Please complete the information below for all accounts for which householding is to be cancelled.
- Accounts not listed will continue to be househanded.
- To change the address on the account for which householding is being cancelled, please check, "Change of address required" to authorize a change of address.
- All account owners must sign where indicated for householding to be cancelled.

If additional space is required, please use additional forms. Householding will begin 30 days after your completed form is returned to your brokerage firm.

Primary Account Information

Account Number _____
Account Registration _____
Social Security/Tax ID _____
Owner Signature _____
Owner Signature _____

Underlying Accounts:

Account Number _____
Account Registration _____
Social Security/Tax ID _____
Owner Signature _____
Owner Signature _____

Change of Address Required

Account Number _____
Account Registration _____
Social Security/Tax ID _____
Owner Signature _____
Owner Signature _____

Change of Address Required

Account Number _____
Account Registration _____
Social Security/Tax ID _____
Owner Signature _____
Owner Signature _____

Change of Address Required

Account Number _____
Account Registration _____
Social Security/Tax ID _____
Owner Signature _____
Owner Signature _____

Change of Address Required