

## 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 to authorize accounts for householding.
- All accounts must have the same mailing address as the primary account.
- To add an account currently registered to another address, check the "Change of Address Required" box to authorize an address change.
- 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 authorized for householding.
- To change the address on the account for which householding is being cancelled, check the "Change of Address Required" box.
- 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