

Account # \_\_\_\_\_

Advisor # \_\_\_\_\_

Use this form to authorize TD AMERITRADE to send duplicate trade confirmations and account statements, and/or provide access to all account information, to another individual ("interested party").

**1 ACCOUNT INFORMATION**

Provide the account numbers you are requesting to have duplicate trade confirmations, statements and/or access to all account information mailed or otherwise made available to an interested party.

**Brokerage Accounts:**


**2 ACCESS LEVEL (PLEASE CHECK ONE)**

Duplicate Statements and Confirmations     Electronic access through Advisor Client

**3 DUPLICATE TRADE CONFIRMATION, ACCOUNT STATEMENT AND OTHER ACCOUNT INFORMATION AUTHORIZATION**

I (We) hereby request duplicate trade confirmations, account statements and/or access to all account information (either in paper or via electronic means) be sent or otherwise made available to the parties indicated below.

**Please send to:**

Name (First, Middle, Last):	Company (if any):	Electronic User ID:
Mailing Address:		
City:	State:	ZIP Code:
Name (First, Middle, Last):	Company (if any):	Electronic User ID:
Mailing Address:		
City:	State:	ZIP Code:

**4 AUTHORIZATION AND SIGNATURES**

All account owners must sign the form to authorize the above instructions.

Signature of Co-owner/Trustee/Authorized Individual \_\_\_\_\_ Date: \_\_\_\_\_

Print Name of Co-owner/Trustee/Authorized Individual \_\_\_\_\_

Signature of Co-owner/Trustee/Authorized Individual \_\_\_\_\_ Date: \_\_\_\_\_

Print Name of Co-owner/Trustee/Authorized Individual \_\_\_\_\_

**TD AMERITRADE Institutional**  
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