



Household Relationship Form

All statements for accounts with the same tax ID number and same address will automatically be mailed in a single envelope. Additional accounts may be added to a single mailing by creating a household relationship. Please check the appropriate box to indicate the purpose of this request.

Create new household relationship

Add account(s) to an existing household relationship

Enter primary account number (optional) _____

Accounts to be included in household _____

Remove account(s) from an existing household relationship Account to be removed from household _____

Is this the primary account? No Yes If yes, indicate the new primary account (optional) _____

Reassign primary account (all addresses must match new primary address)

Existing primary account _____ New primary account _____

Dissolve household relationship (all accounts will now become eligible for automated household relationship: statements for accounts with the same tax ID number and same address will automatically be mailed in a single envelope.)

Please list one existing account in the household _____

Exclude account from participating in a household relationship Account to be excluded from household _____

All account holders in the household relationship must sign below (if additional space is needed, please attach a separate sheet):

Client Name _____ Client Signature _____ Date _____

Client Name _____ Client Signature _____ Date _____

Client Name _____ Client Signature _____ Date _____

Client Name _____ Client Signature _____ Date _____

Client Name _____ Client Signature _____ Date _____

Registered Representative _____ RR Signature _____ RR ID _____